

2011 Yemen Stability Survey



Glevum Stability Assessment

March 2011



Collection of research data, the data analysis and development of report were funded exclusively at private expense by Glevum Associates, LLC

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Methodology



Methodology

Sample

- A representative sample of 1,005 Yemeni adults (15+) was drawn from 8 of the 21 governorates of Yemen using a multi-stage, probability proportional to size (pps) cluster sample.
- Governorates were selected on the basis of their economic and political significance within Yemen and accessibility. Only one governorate, Sa'dah was excluded for security reasons.
- PPS cluster samples are self-weighting and reduce standard errors and bias associated with simple cluster sampling. They require no adjustments to estimates based upon design effects.
- The number of interviews conducted within each stage of sampling was proportional to the size of the population of the sampling units according to the CSO General Population Housing and Establishment Census 2004 and the CSO Yemen Statistical Yearbook 2008.
- Households were selected for interview by random route, random interval method.
- Respondents were randomly selected within households using a Kish Grid.
- 13 percent of interviews were directly observed by field supervisors, 17 percent were back-checked in person afterwards.
- The final response rate was 80.02% based upon all contact attempts and 84.24% based on all successful contacts.
- The margin of error for the sample is approximately 3.09 percentage points.



Methodology

Data Collection

- Collected in the field by Glevum research partner Hot Zone Research.
- Fielded between January 22 – February 20, 2011.
- Face-to-face interviews with responses recorded by the interviewer using paper and pencil format.



Photos from interview sessions conducted across Yemen

Data Analysis

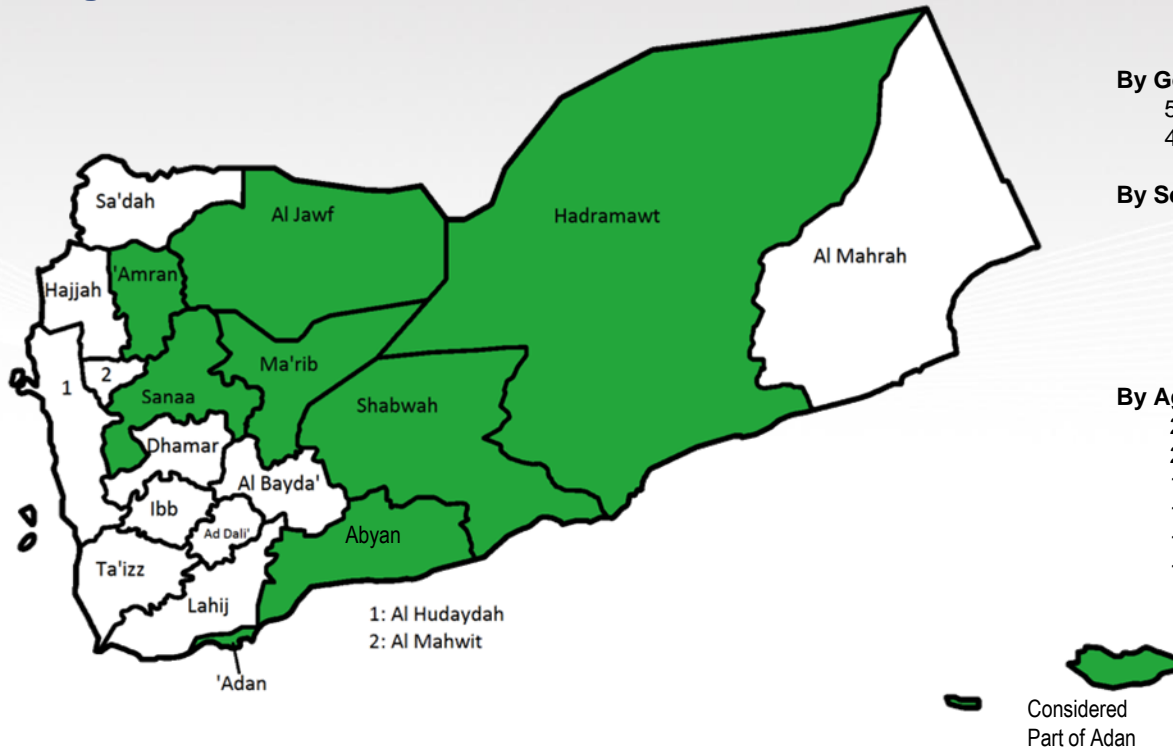
- Statistical tests used in this report include Fischer's Exact, Chi-Square, Paired T-tests, McNemar's test and polychoric correlations.
- Results for subpopulations are shown only when both a substantive and significant difference between groups exists.
- Mean values, where displayed, are a summary measure combining both direction and intensity of attitudes into a single metric.

The study was conducted in compliance with ICC/ESOMAR codes and guidelines. A more detailed methodology report is available at Glevumusa.com



Sample Profile

The study focuses on a representative sample of the adult (15+) public in 8 key governorates throughout Yemen. Governorates included in the sample are marked in green.



Survey Sample Characteristics:

1,005 individuals

By Gender:

50.6% Male
49.5% Female

By Sectarian Affiliation:

59.8% Sunni
18.1% Zaydi Shia
11.3% Ismaili Shia
10.8% Imami Shia

By Age:

24.2% 15-19
20.5% 20-25
13.8% 26-30
19.5% 31-40
11.4% 41-50
10.6% 51 or older

By Education:

3.7% No Formal Education
3.1% Completed Primary
18.3% Completed Intermediate
58.4% Completed Secondary
16.5% University & Higher

By Governorate:

7.6% Abyan
10.3% Adan
8.2% Al Jawf
15.4% Amran
17.8% Hadramawt
4.3% Ma'rib
27.8% Sanaa
8.8% Shabwah

Urban v. Rural:

53.4% Urban
46.6% Rural

By Employment Status:

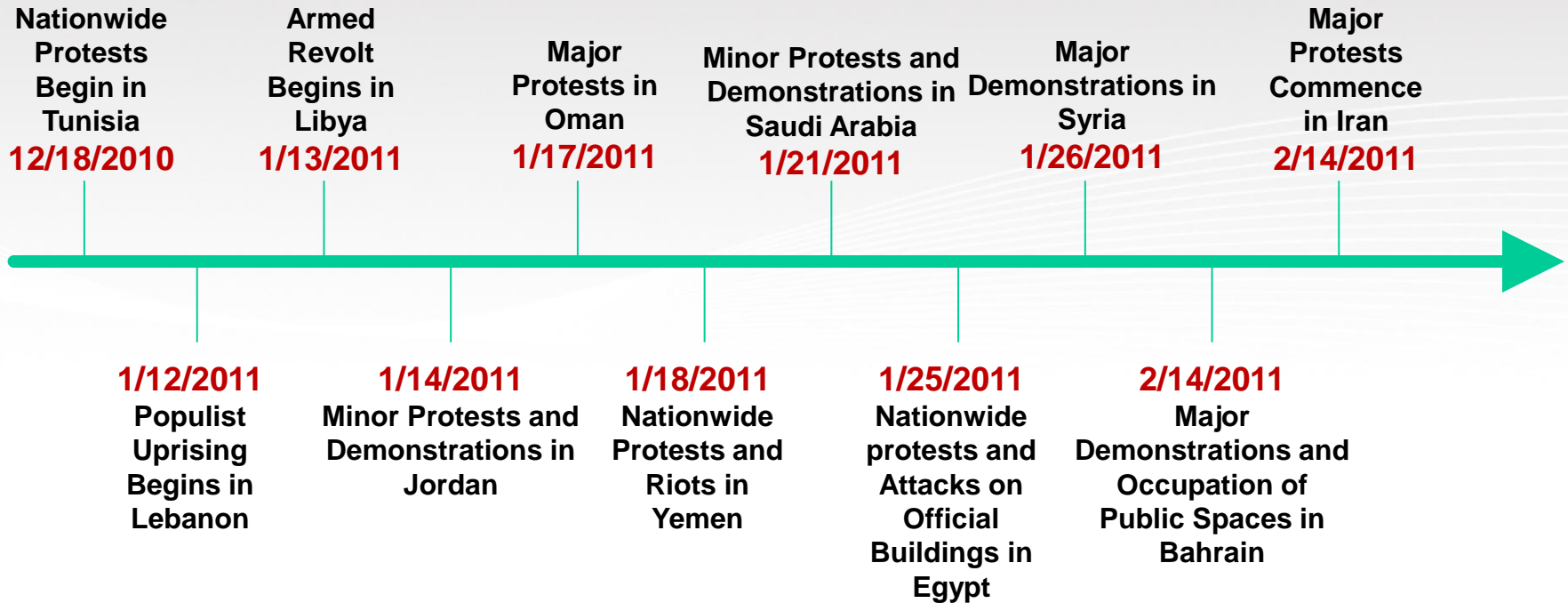
55.0% Employed
45.0% Unemployed



Executive Summary



Timeline of Popular Uprisings in the Middle East and North Africa



Research Questions

#1: Most Urgent Issues Facing Yemen

- Are things headed in the right direction or the wrong direction?
- What is the most urgent issue facing Yemen?
- What outside group is believed to be best able to help Yemenis solve the problem of violence in Yemen?

#2: Popularity of Government and Political Groups

- How popular are various political figures and groups in Yemen?
- How satisfied are Yemenis with the provision of government services?
- What are Yemenis' opinions regarding President Saleh and the execution of his duties?
- How well is the Government of Yemen handling tensions in the country?

#3: Opinions on Violence and Al-Qaeda

- Are Yemenis sympathetic to the use of violence?
- How do Yemenis feel about Al-Qaeda in the Arab Peninsula?

#4: Perceptions of the United States

- What perceptions do Yemenis hold about the United States' influence in the world?
- Do Yemenis support U.S. involvement in the Middle East?
- Do Yemenis want the U.S. to provide security assistance in Yemen?



Summary Findings

Key Take-Away Points

- **Yemenis are angry and this impacts how they feel about their leaders and the government. To put the right/wrong direction numbers in perspective our latest work in Iraq (Jan-Feb 2011) shows the mood is 41% right direction compared to 56% wrong direction, while in Yemen it is 3% right direction compared to 88% wrong direction.**
- **Yemenis are primarily concerned with their security. Zaydi Shia and Imami Shia are most concerned with security while Ismaili Shia and Sunnis are more worried about economic matters.**
- **Key political officials in Yemen are not popular. President Ali Saleh receives mixed ratings, although he still has a sizable support base. Southern Movement leader Ali Salem al-Beidh is even less popular. Approximately one-third are satisfied with the job Saleh is doing but a majority disapprove.**



Summary Findings Continued

Key Take-Away Points

- Just 1% feel the U.S. should help Yemen address the upsurge in violent protest. They feel the Arab League is best positioned to provide assistance.
- There is almost no support for President Ali Saleh's policy of cooperating with the United States. Yemenis are critical of the U.S. led war on terrorism and U.S. policy towards the Islamic world; opinions about the U.S. government are deeply negative (55% very unfavorable / 43% somewhat unfavorable).
- Even though people hold a negative opinion of the United States, Yemenis are split on the issue of U.S. military assistance to Yemen. Interestingly, 46% support U.S. military assistance while 54% oppose U.S. military intervention.
- There is a notable level of popular support for the radical cleric Anwar al-Awlaki and for the actions and agenda of the terrorist group 'Al-Qaeda in the Arabian Peninsula'.



Detailed Findings

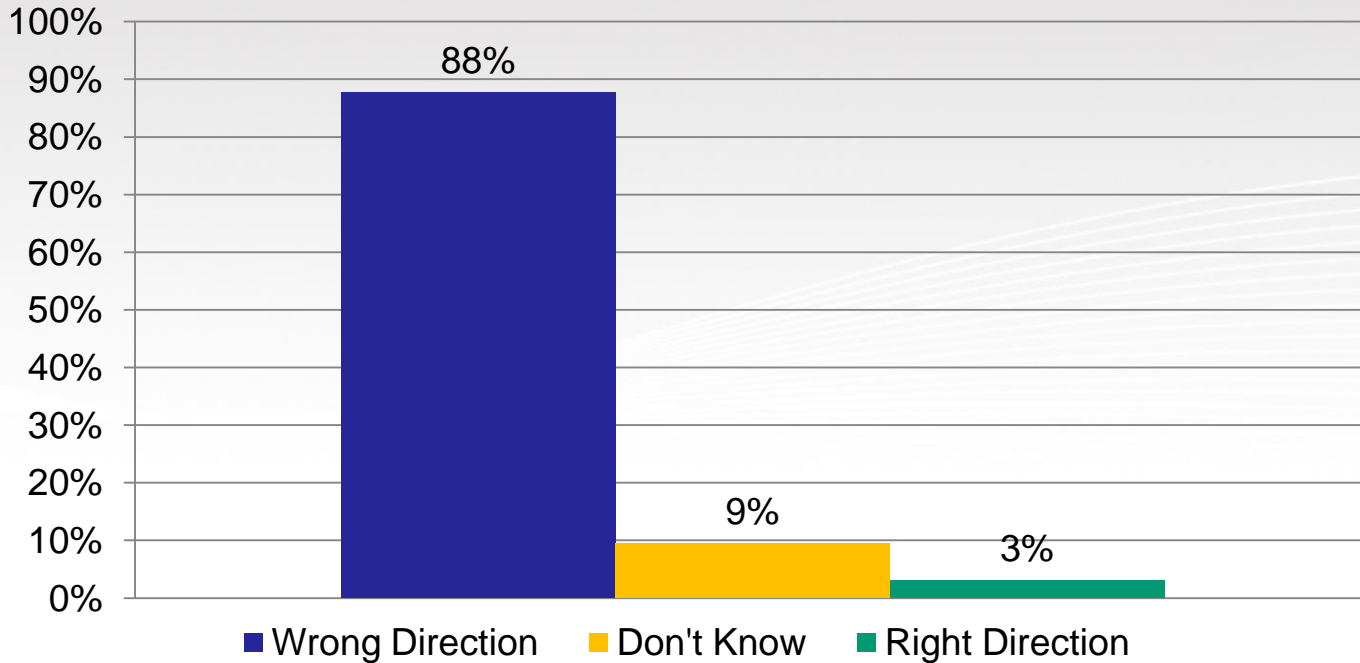


Most Pressing Issues Facing Yemen



Most Urgent Issues: Right Direction/Wrong Direction

Yemenis are angry. Almost 9 out of 10 Yemenis feel things are headed in the wrong direction in Yemen. Only 3% think things are headed in the right direction.

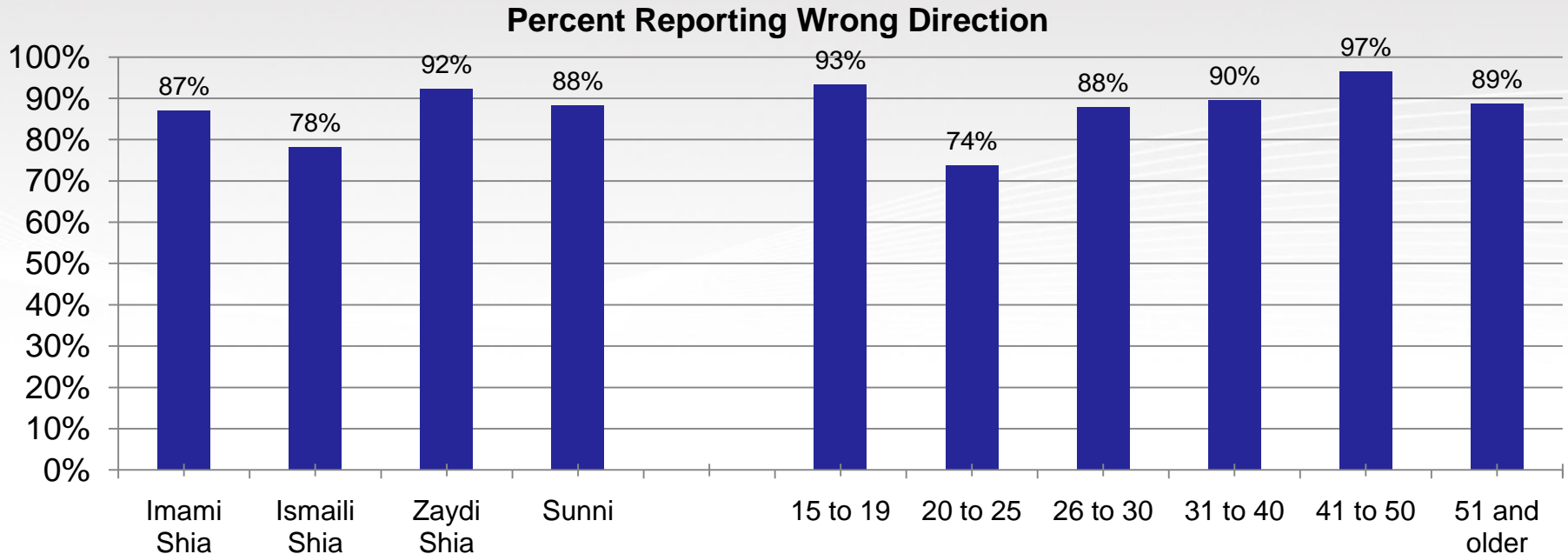


Q2: In general, do you feel things in Yemen are going in the right direction or wrong direction?



Most Urgent Issues: Right Direction/Wrong Direction

Despite reports of their heavy involvement in protests, Yemenis ages 20 to 25 are at least 14 percentage points less likely to think things in Yemen are going in the wrong direction than other age groups.



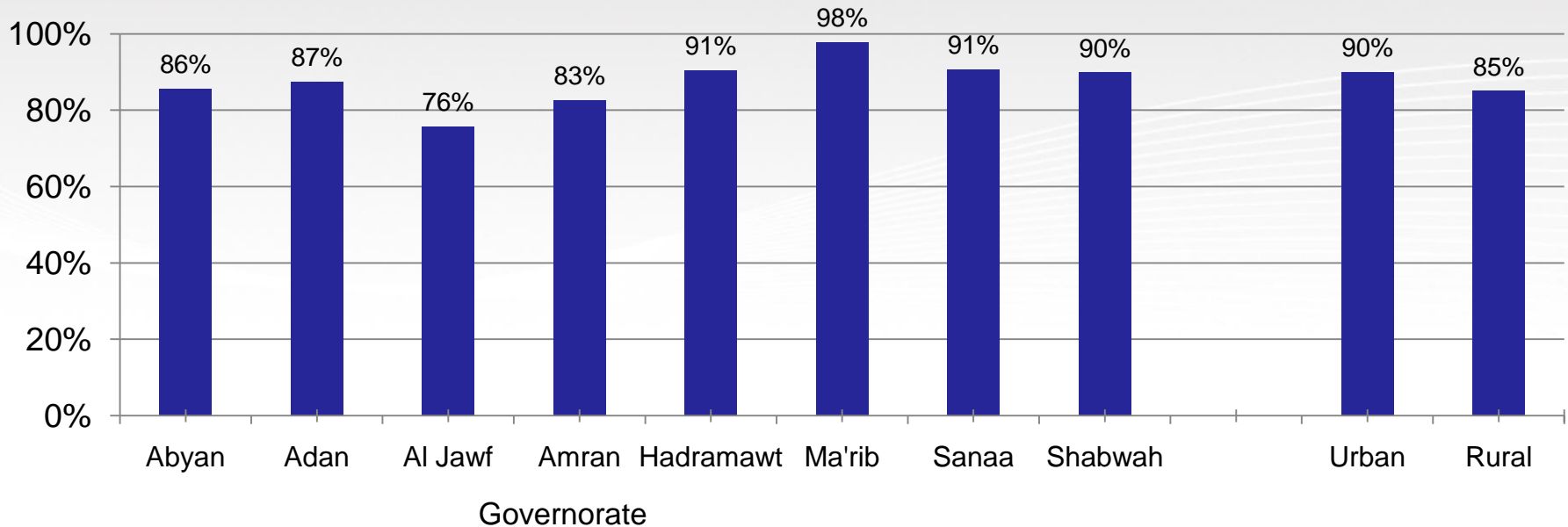
Q2: In general, do you feel things in Yemen are going in the right direction or wrong direction?



Most Urgent Issues: Right Direction/Wrong Direction

Almost everyone in Ma'rib believes things in Yemen are headed in the wrong direction. Yemenis in Al Jawf are the least likely to believe so even though 76% do. Discontent is higher in urban locations than rural locations.

Percent Reporting Wrong Direction

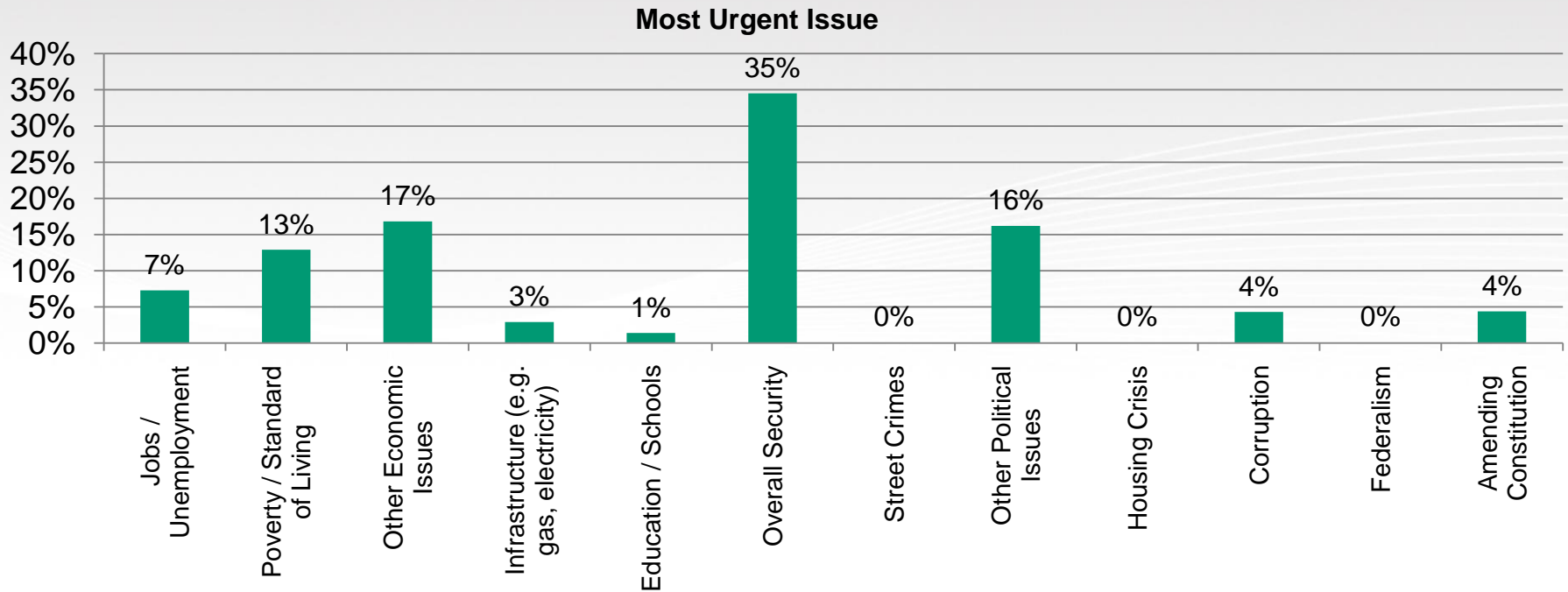


Q2: In general, do you feel things in Yemen are going in the right direction or wrong direction?



Most Urgent Issues - Security is the Primary Concern

More than 1/3rd of Yemenis identify the security of the country as the most urgent issue facing Yemen. 37% identify aggregate economic concerns as the most urgent issue, while 24% identify aggregate political concerns as most urgent. The most chosen economic issue and political issue are issues that were not among those specifically identified in the survey.



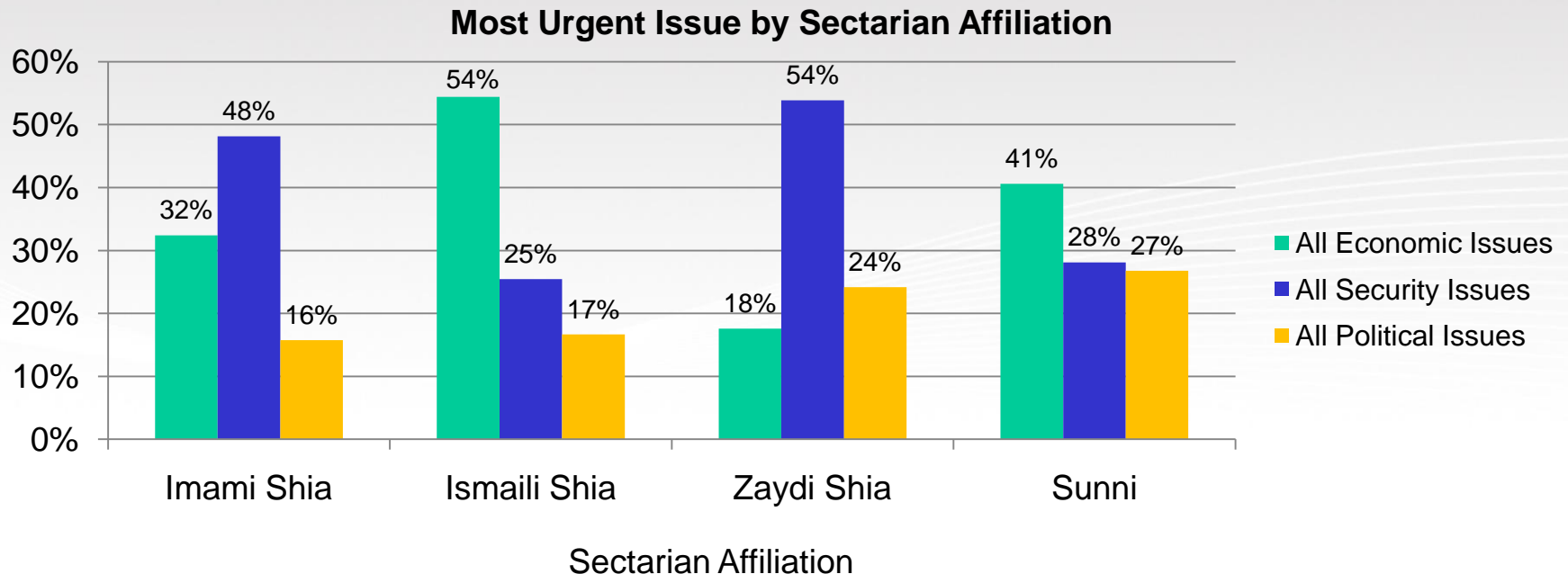
Q1: In your opinion, what is the most urgent issue facing our country today?

Note: The most chosen economic response option and political response option were both "other economic issues" and "other political issues". In terms of political issues, "other political issues" was chosen in far greater numbers than the other specifically identified response options we had in the survey related to political issues.



Most Urgent Issues

Approximately half of Imami Shia and Zaydi Shia identify security as the most urgent issue, while Ismaili Shia and Sunnis find economic concerns as the most important issue.

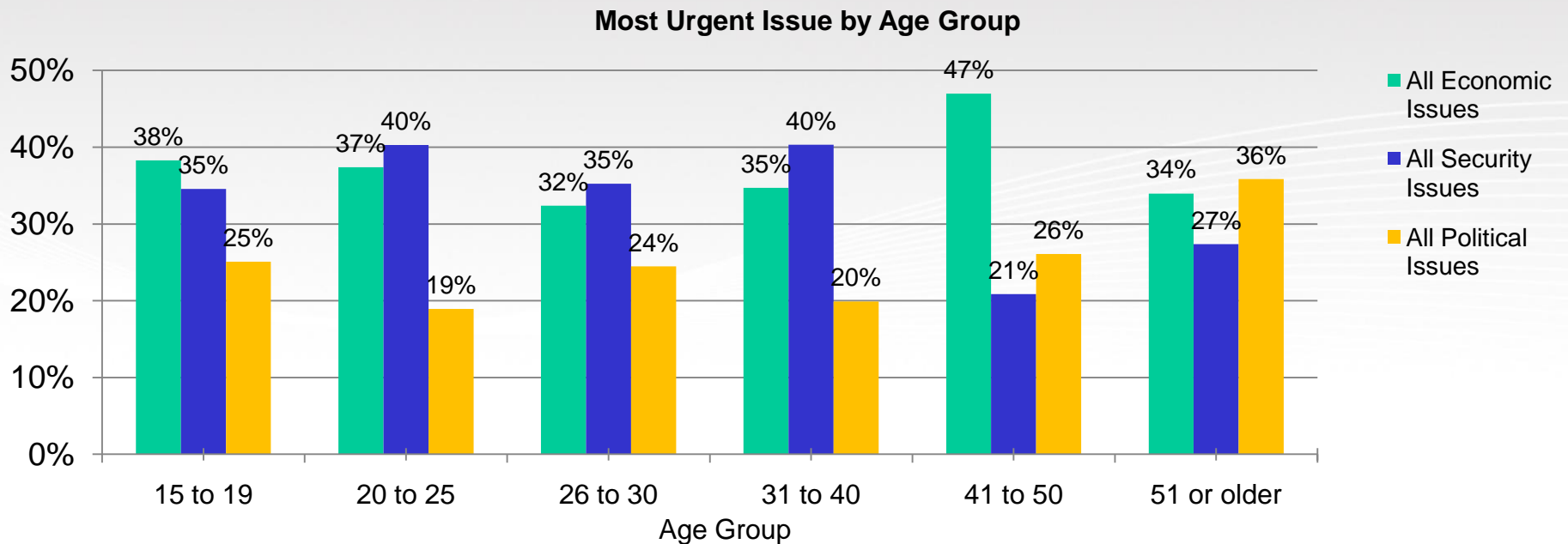


Q1: In your opinion, what is the most urgent issue facing our country today?



Most Urgent Issues

Economic, security and political issues retain the same level of urgency across most age groups. Yemenis aged 41 to 50, however, report economic issues as more urgent than other Yemenis and security issues as less urgent.

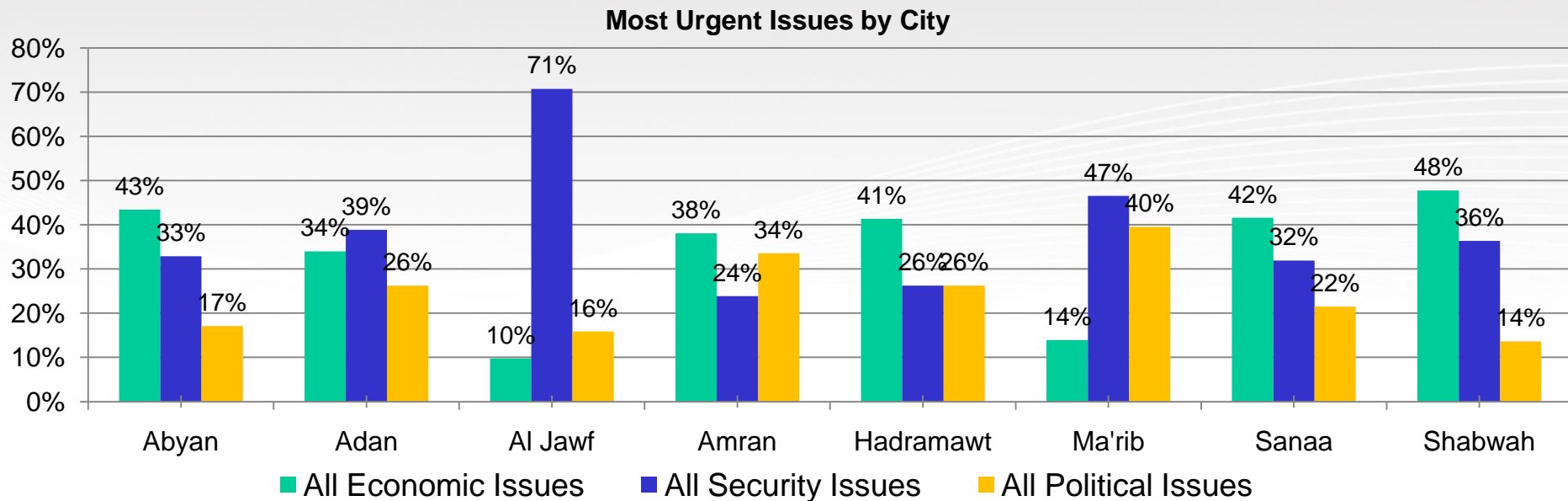


Q1: In your opinion, what is the most urgent issue facing our country today?



Most Urgent Issues

Overall, economic issues are most urgent in 5 of the 8 governorates. 71% of Yemenis in Al Jawf identify overall security as the most urgent issue, which is 24 percentage points more than the next highest city, Ma'rib. There is little difference between urban and rural respondents.

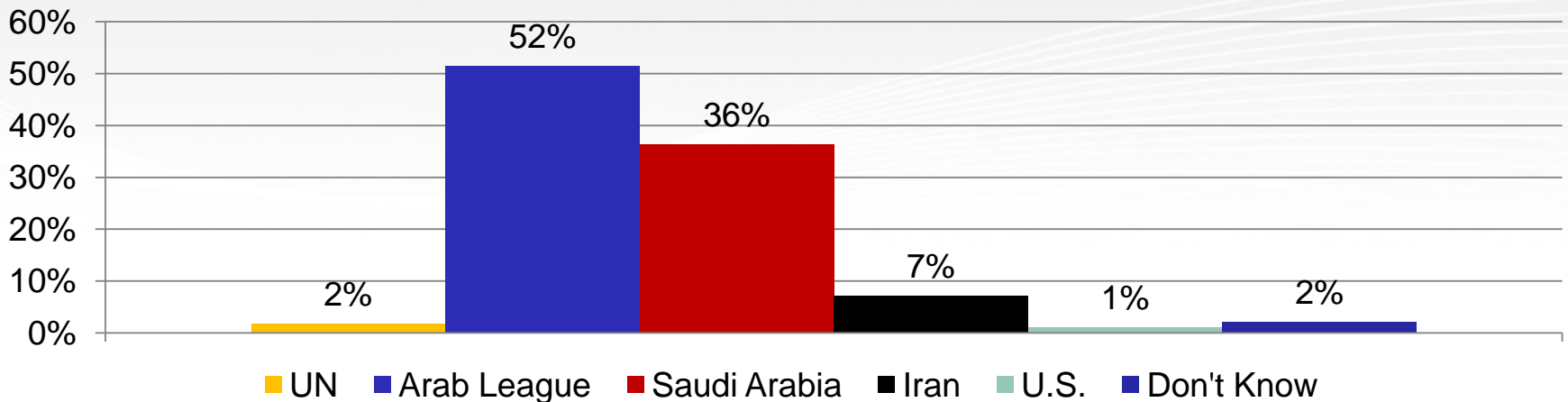


Q1: In your opinion, what is the most urgent issue facing our country today?

Most Urgent Issues: Outside Help of Choice

Overall, approximately half of Yemenis believe the Arab League is the external group that can best help address violent protests in Yemen. About 1/3rd believe Saudi Arabia is best suited to help. Only about 1% believe the U.S. is best situated to help Yemen, while 7% believe Iran is best suited to help.

External Group That Can Best Help Yemen



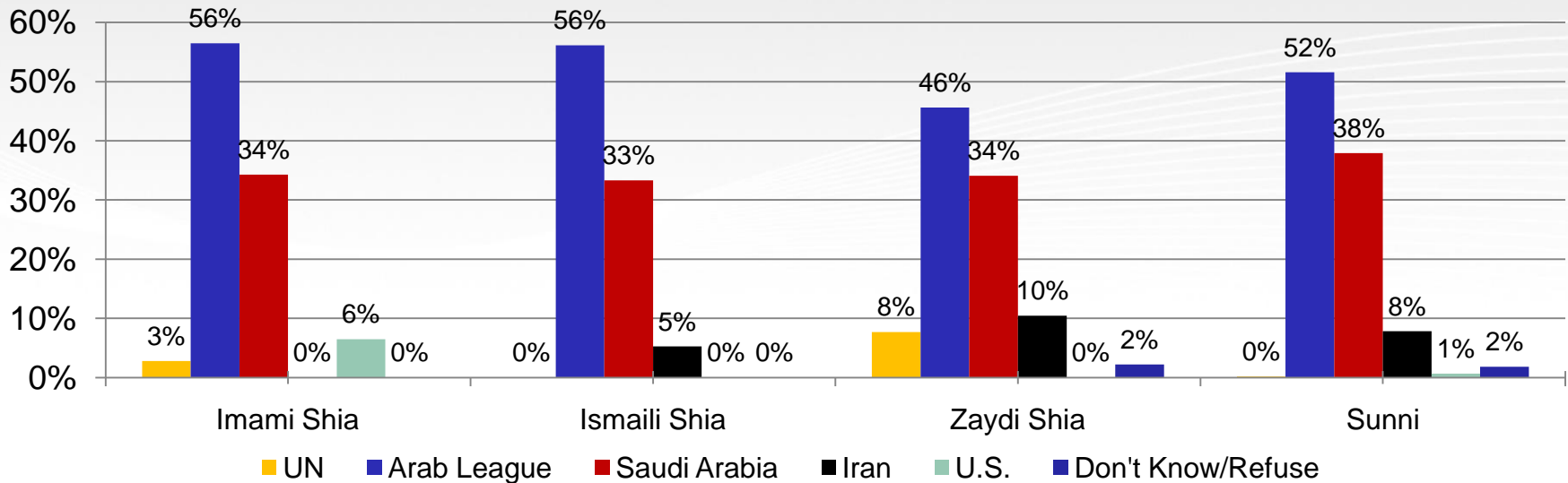
Q3: In your opinion, which country, organization or group from outside Yemen can best help Yemenis solve the problem of violence in our country?



Most Urgent Issues: Outside Help of Choice

Belief that the Arab League or Saudi Arabia is the outside group that can best help Yemen is consistent across sectarian affiliations. Sunnis and Shia affiliated with Ismaili Shia or Zaydi Shia score similarly with regard to Iran, while 6% of Imami Shia instead believe that the U.S. is best to help with Yemen's violence.

External Group That Can Best Help Yemen



Q3: In your opinion, which country, organization or group from outside Yemen can best help Yemenis solve the problem of violence in our country?



Detailed Findings

Popularity of Political Groups and Influential Leaders



Influential Yemeni Figures

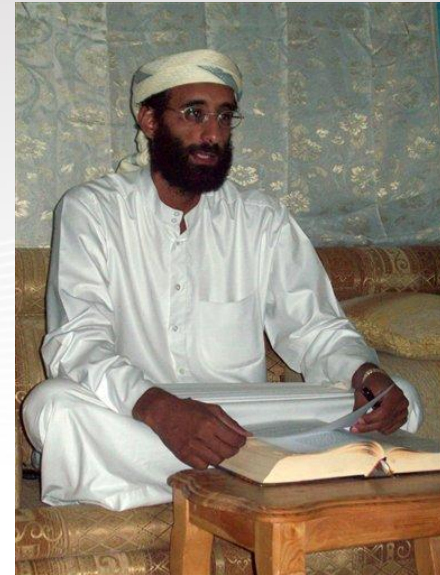


Yemeni President Ali
Abdullah Saleh



Ali Salim Al-Beidh

Former General Secretary of
the Yemeni Socialist Party,
Leading the Independent
People's Democratic Republic
of South Yemen

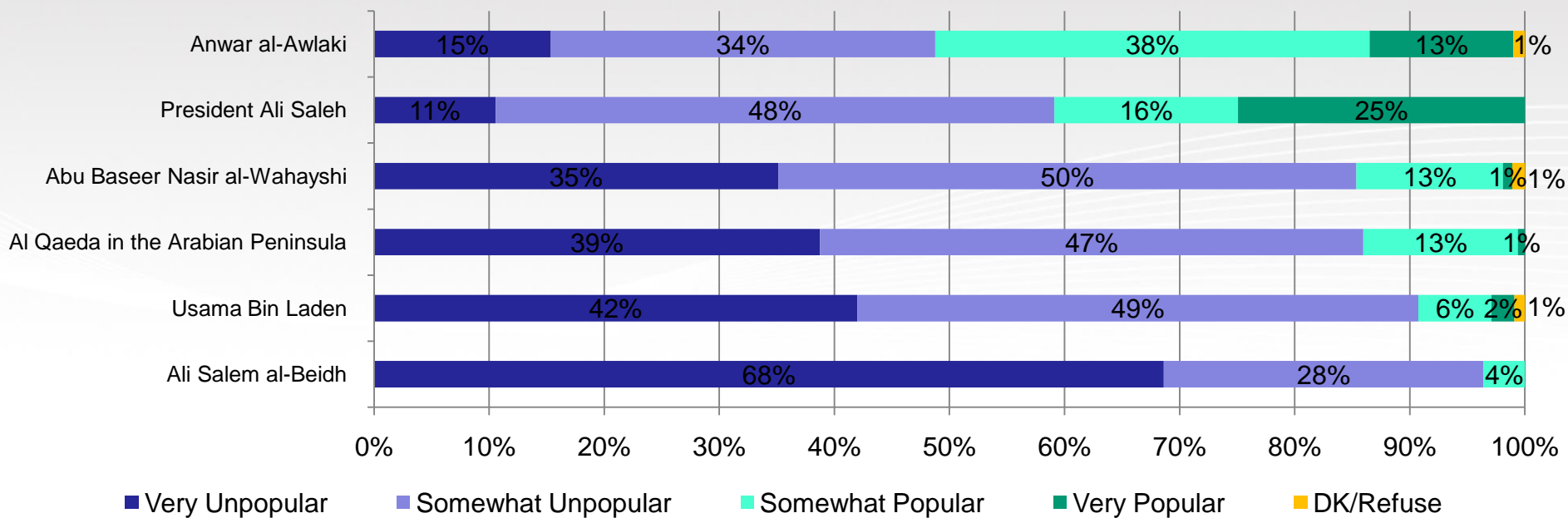


Anwar Al-Awlaki

Radical, American-born
Sunni Preacher and Lecturer

Popularity

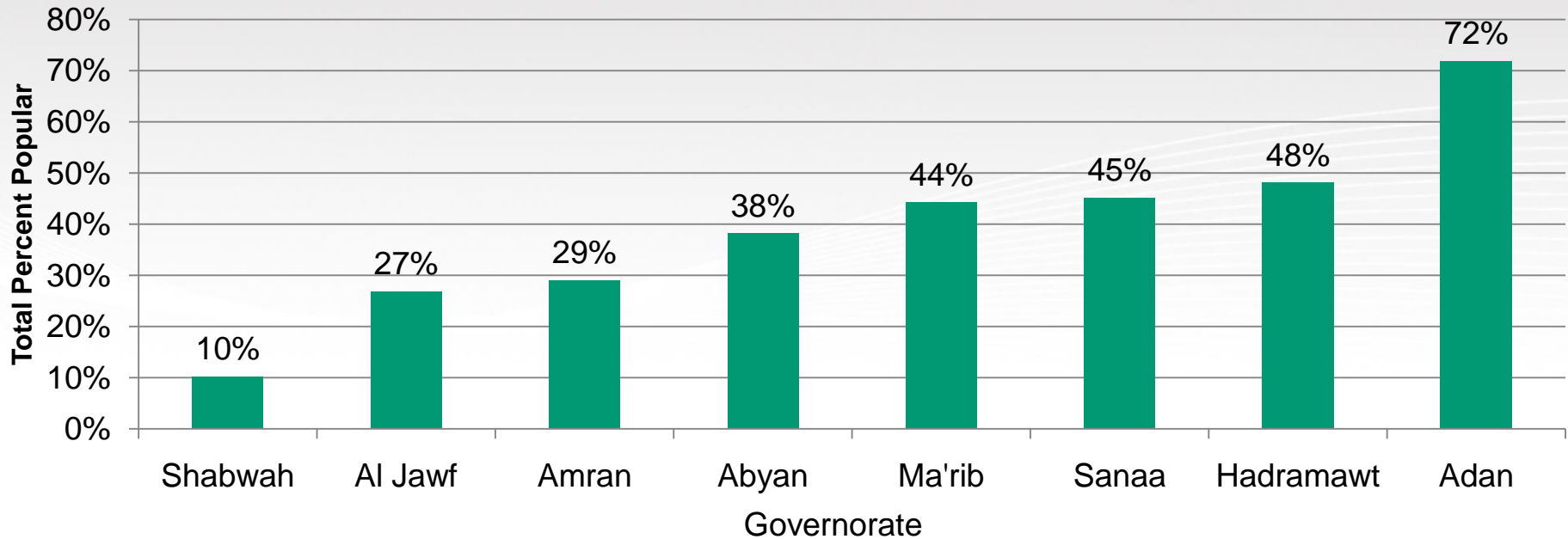
Overall, the most popular figure in Yemen is Anwar al-Awlaki, the American-born Islamic extremist cleric and notorious blogger. However, the intensity of al-Awlaki's popularity is low. More Yemenis rate President Saleh as 'very popular' than al-Awlaki.



Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?

Popularity: President Ali Saleh

President Saleh's popularity is at its lowest in Shabwah and at its highest in Adan.

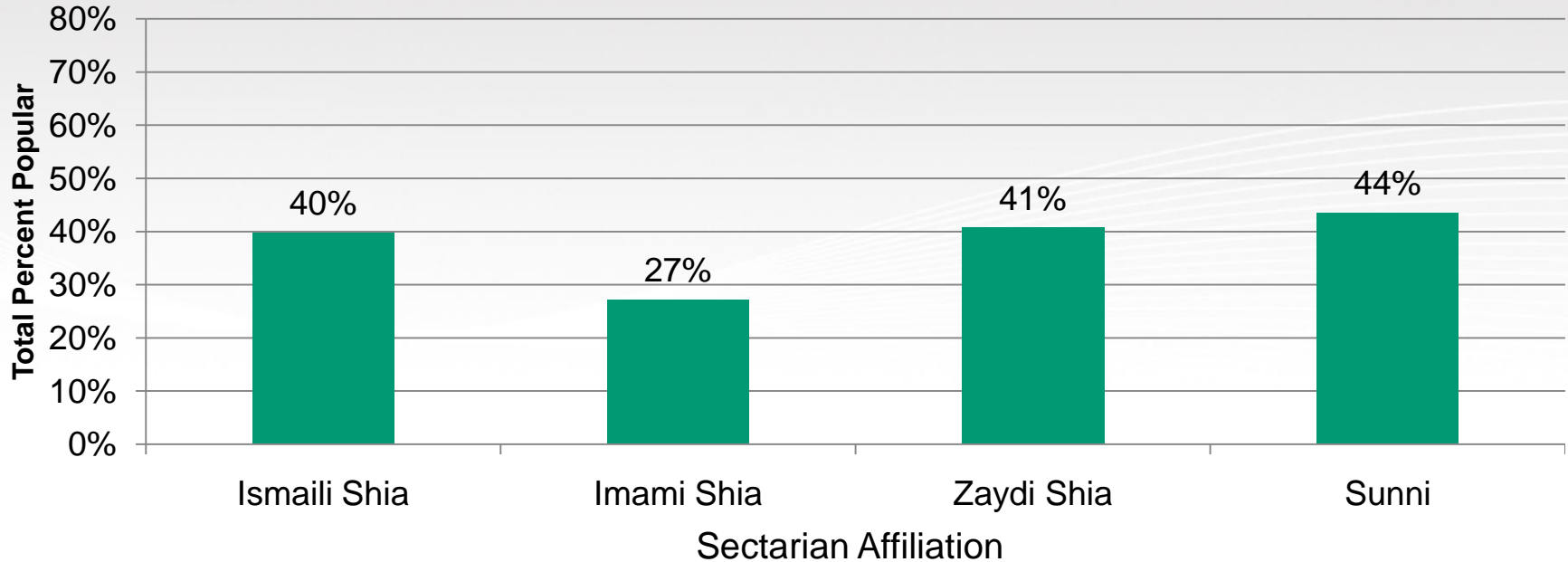


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: President Ali Saleh

President Saleh is over 10 percentage points less popular with Ismaili Shia than Yemenis of other sectarian affiliations.

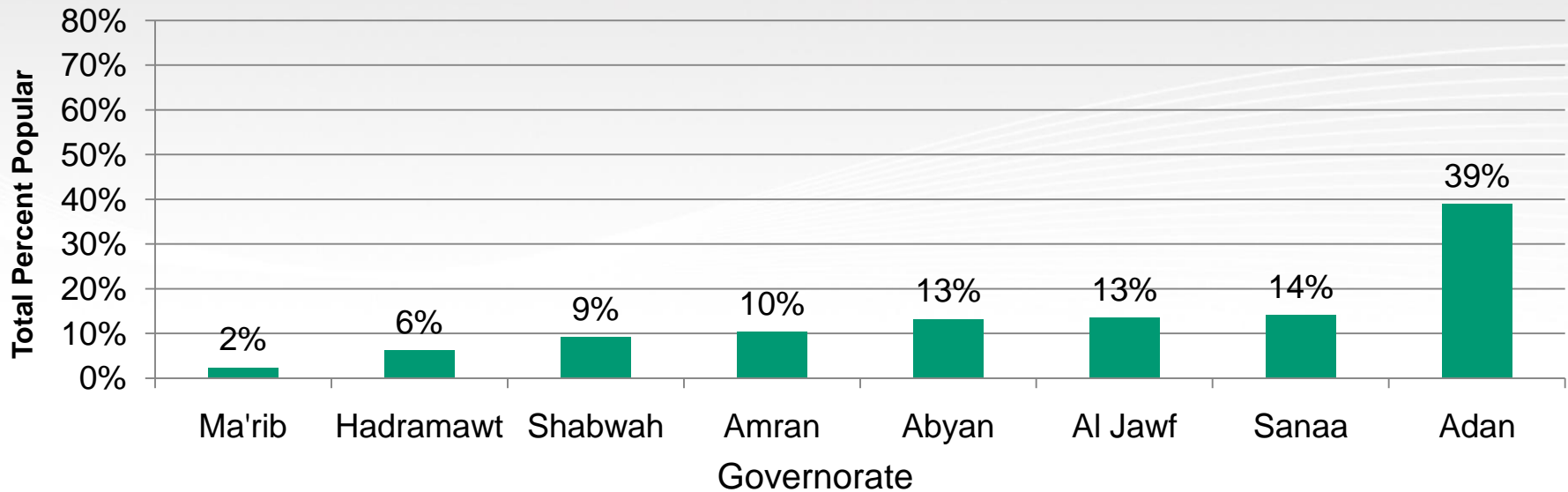


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Abu Baseer Nasir al-Wahayshi

While overall almost 9 out of 10 Yemenis believe that Abu Baseer Nasir al-Wahayshi, senior leader of the Islamist militant group Al-Qaeda in the Arabian Peninsula, is unpopular in their area, al-Wahayshi is four times more popular in Adan than other parts of Yemen.

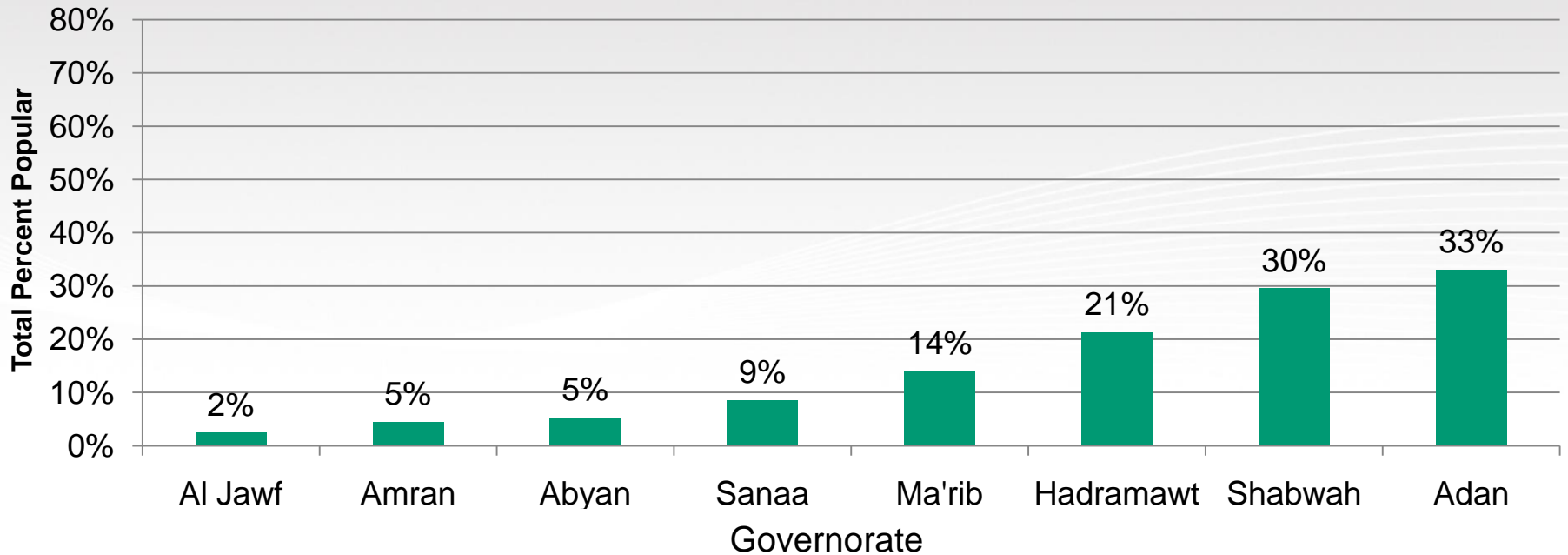


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Al-Qaeda in the Arabian Peninsula

While overall unpopular in Yemen, Al-Qaeda's popularity is highest in the Southern governorates, with Adan being the highest (33%).

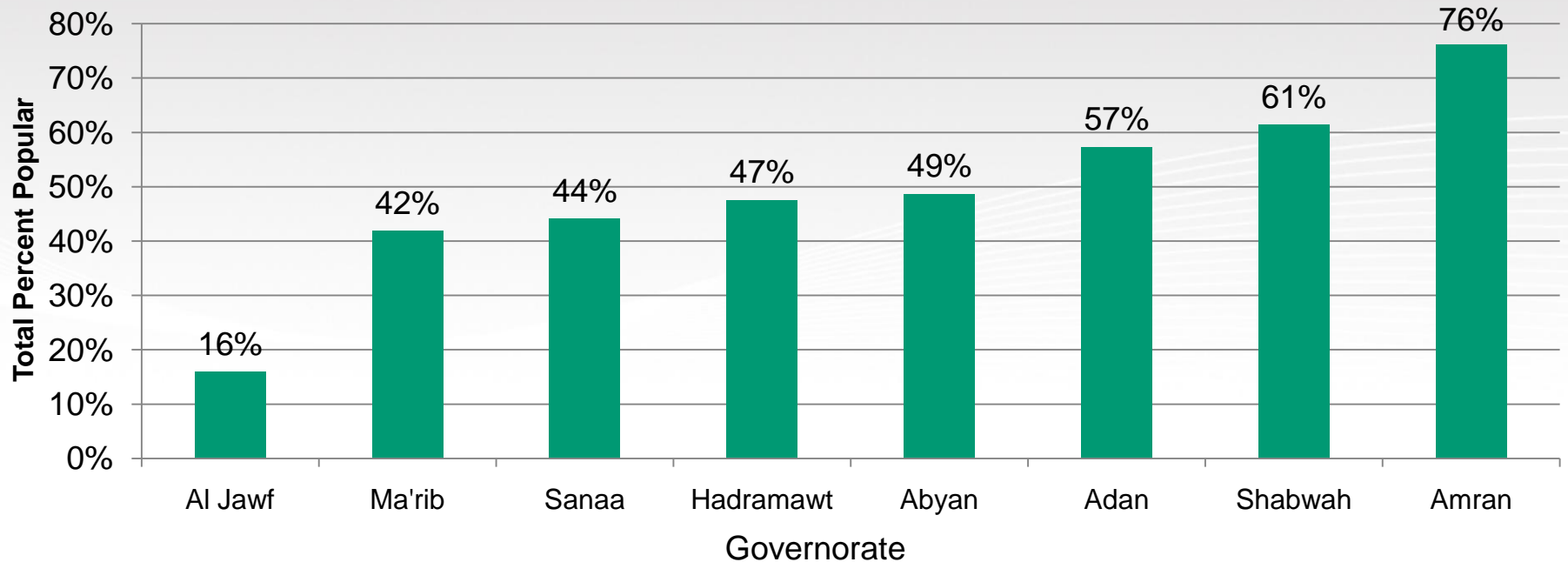


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Anwar al-Awlaki

Al-Awlaki's level of popularity in Al Jawf is less than 1/3rd of that found in the rest of Yemen. He is most popular in Amran (76%).

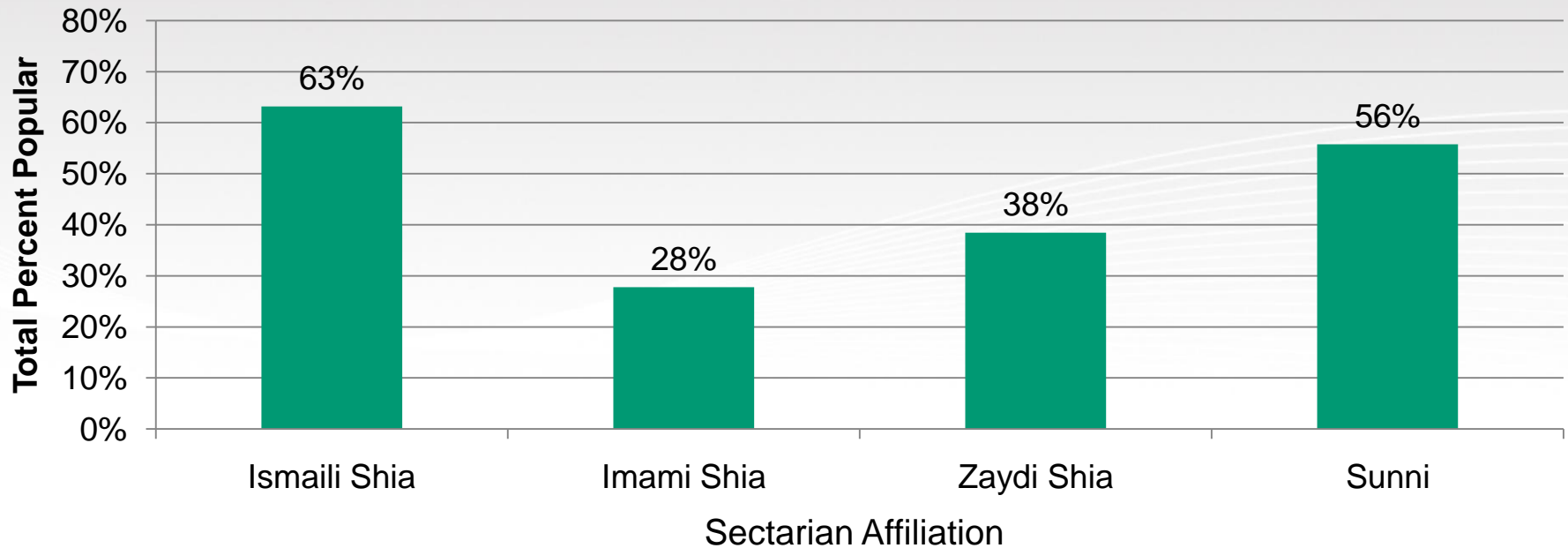


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Anwar al-Awlaki

Al-Awlaki is least popular among Imami Shia and Zaydi Shia and most popular among Ismaili Shia and the Sunnis.

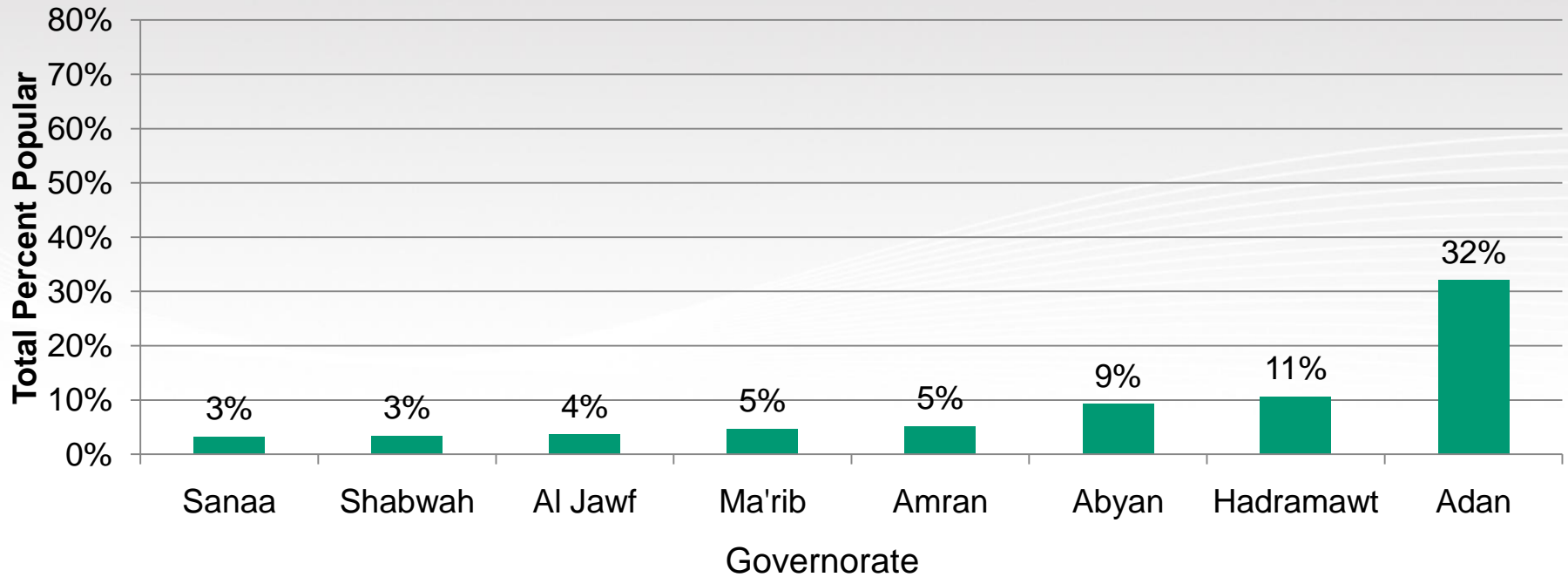


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Usama Bin Laden

Bin Laden is much more popular in Adan (32%) than in other parts of Yemen. This is consistent with other measures of support for Al-Qaeda

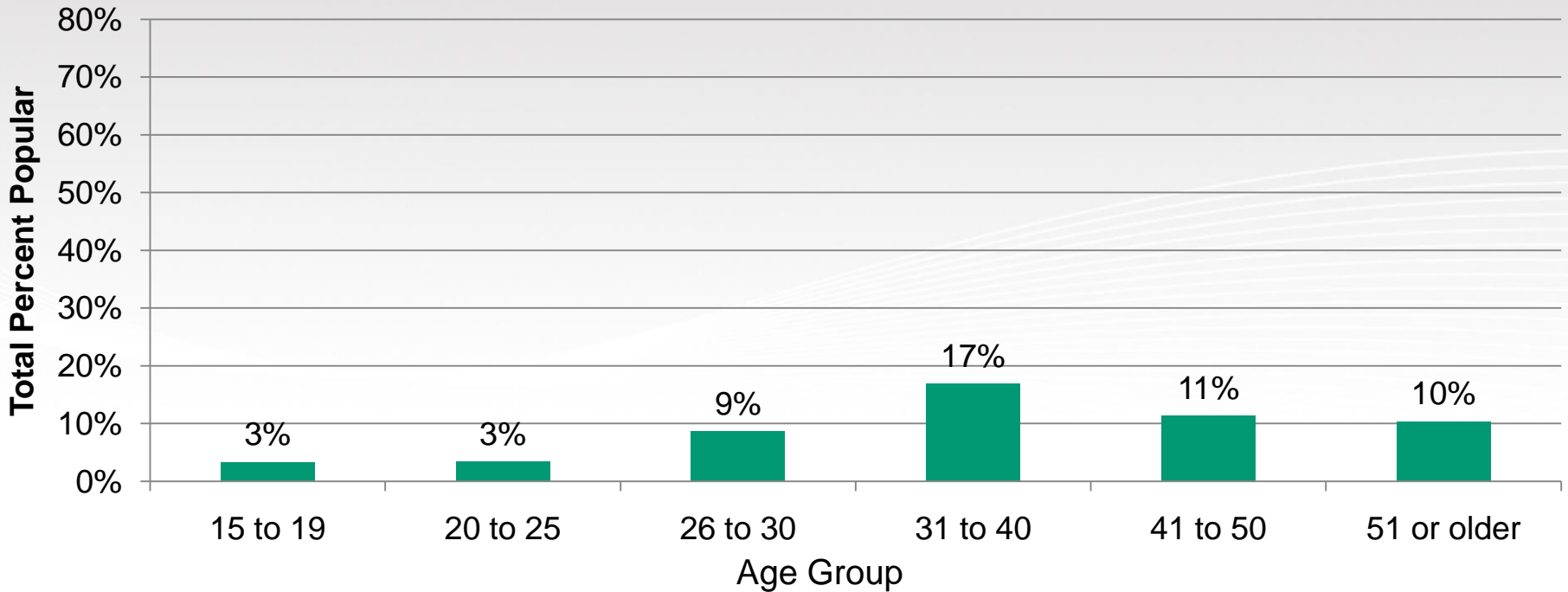


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Usama Bin Laden

Bin Laden is more popular among older Yemenis than younger Yemenis.

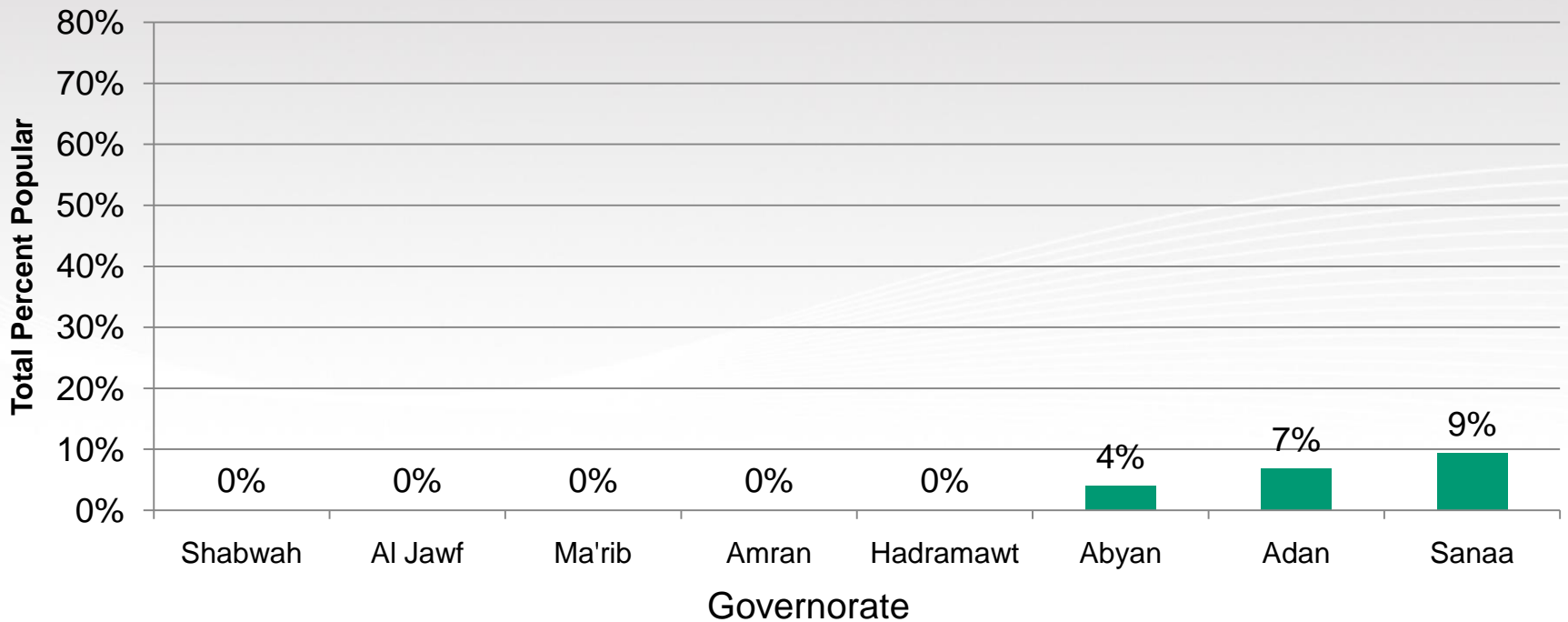


Q4: From what you know or have heard from others, how popular are the following people or groups amongst the population of this area?



Popularity: Ali Salem al-Beidh

Al-Beidh is believed to be unpopular in every governorate in Yemen.

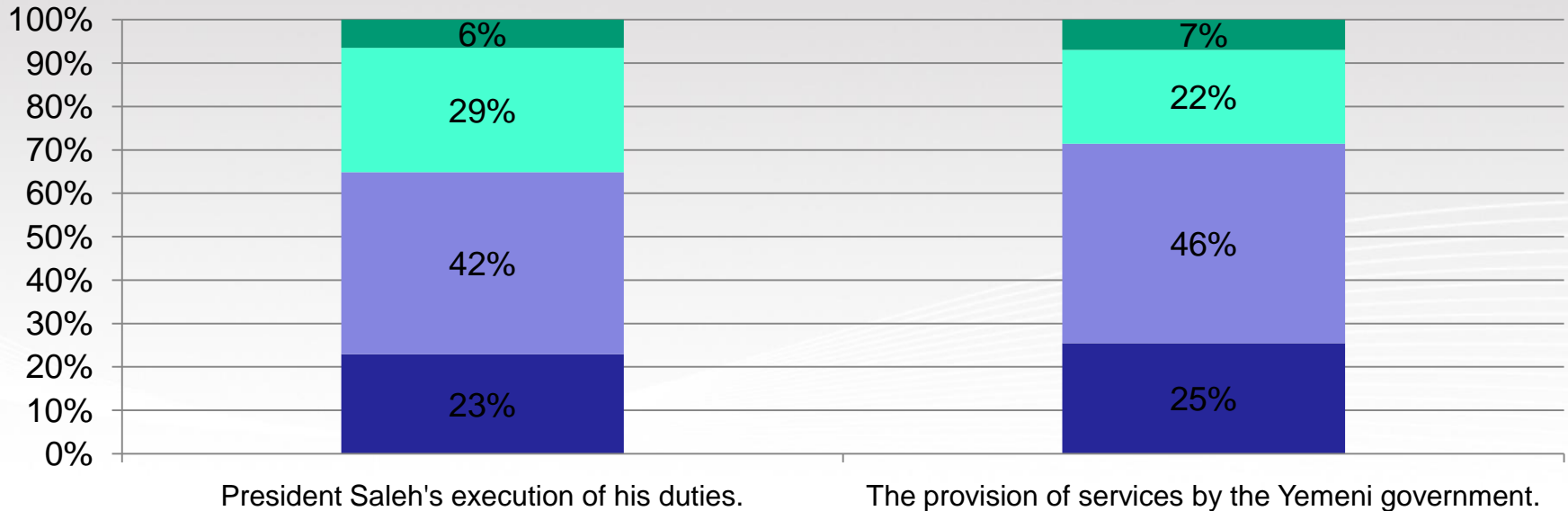


Q4: From what you know or have heard from others,, how popular are the following people or groups amongst the population of this area?



Duties and Services of Government

Job satisfaction numbers for President Saleh are very weak.



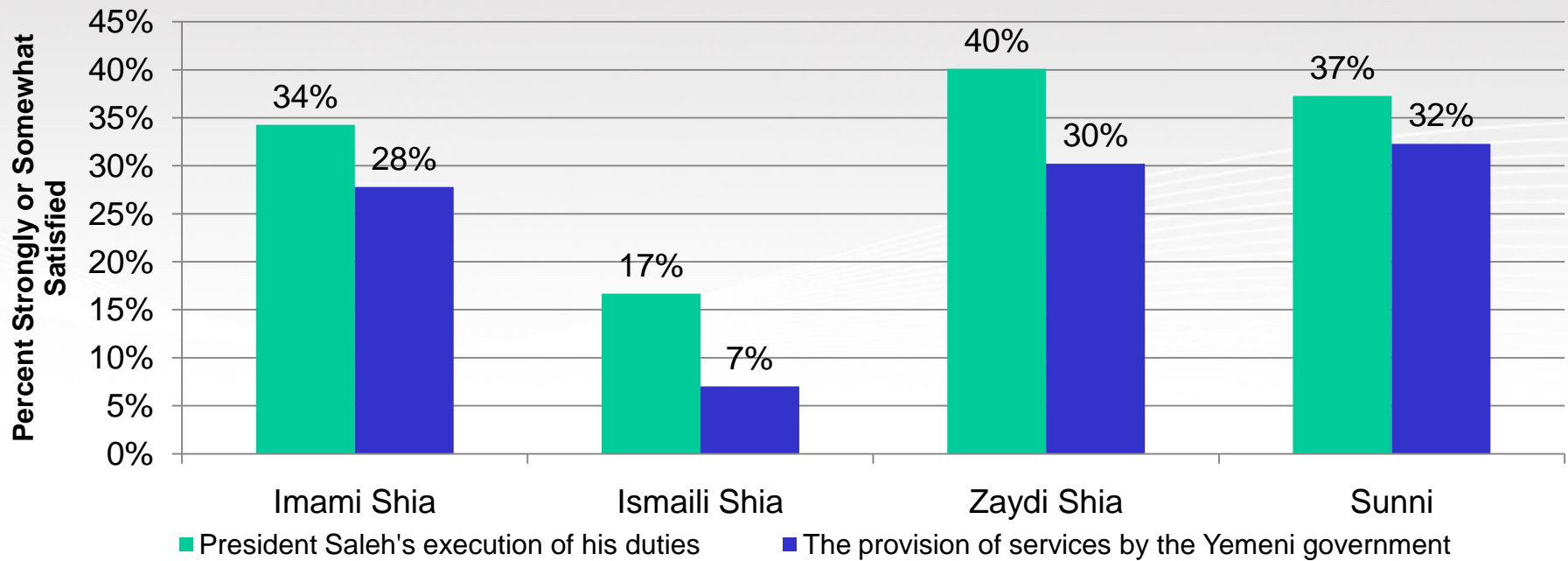
■ Strongly Dissatisfied ■ Somewhat Dissatisfied ■ Somewhat Satisfied ■ Strongly Satisfied ■ Don't Know/Refuse

Q7: From what you know, or have heard from others, how satisfied are people in this area with President Saleh's execution of his duties / the provision of services by the Yemeni government?



Duties and Services of Government

Only 7% of Ismaili Shia are satisfied with government services, four times lower than Yemenis of other sectarian affiliations.

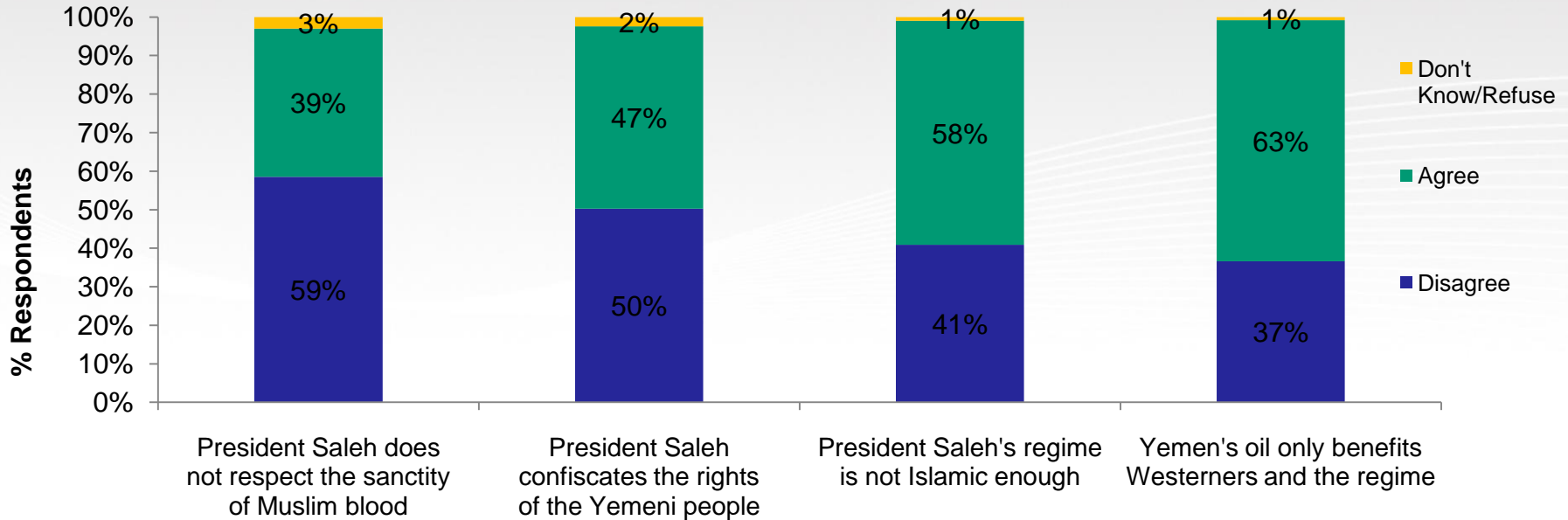


Q7: From what you know, or have heard from others, how satisfied are people in this area with President Saleh's execution of his duties / the provision of services by the Yemeni government?



Opinions of President Saleh's Regime

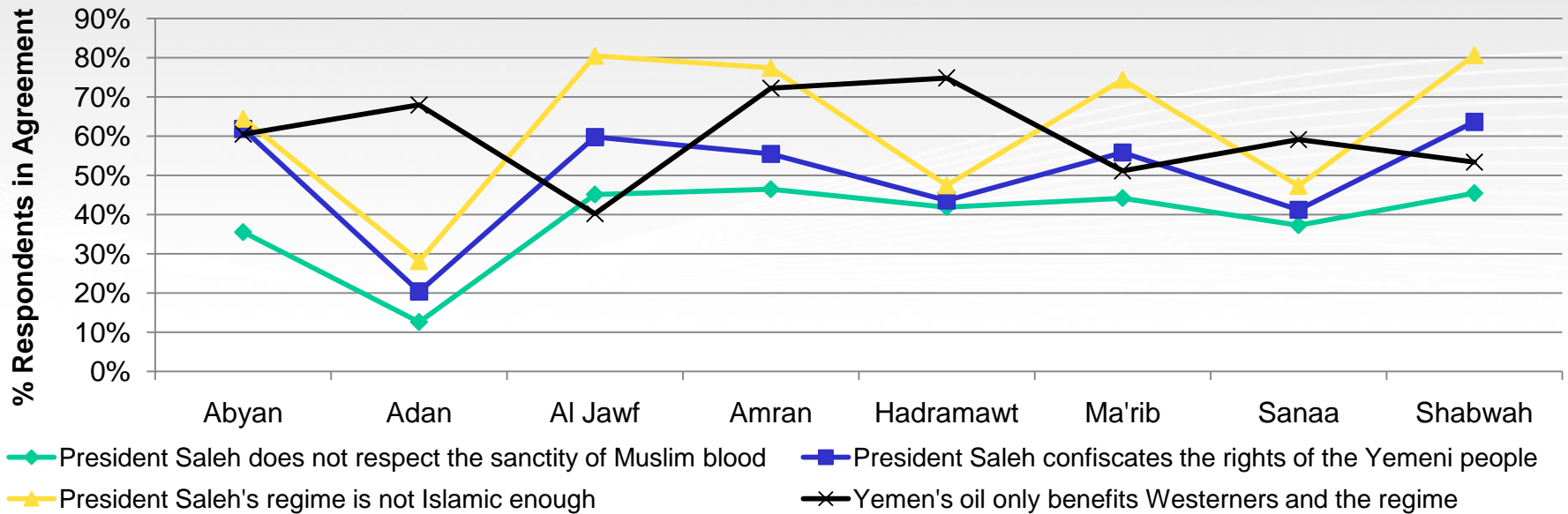
Opposition criticism of the Saleh regime and the arguments of Al-Qaeda in the Arabian Peninsula resonate with large segments of the Yemeni population. Majorities believe that oil production does not benefit the people and that Saleh's regime is not Islamic enough. Sizeable minorities believe Saleh confiscates the rights of his people and does not respect the sanctity of Muslim blood.



Q15: From what you know or have heard from others, how strongly do people in this area agree or disagree with the following statements?

Opinions of President Saleh's Regime

Agreement for President Saleh not respecting Muslim blood and his confiscation of Yemeni's rights fluctuates similarly across all governorates. Adan, Amran and Hadramawt have the highest negative ratings for oil, while Al Jawf, Amran and Shabwah agree most that Saleh's regime is not Islamic enough.

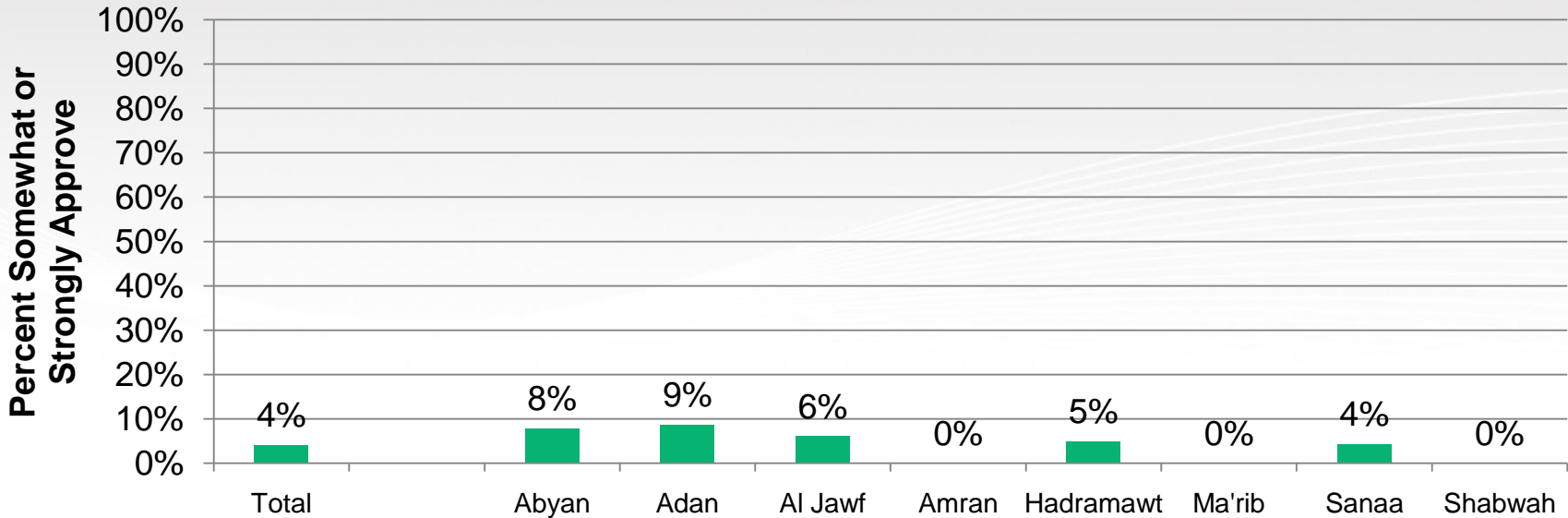


Q15: From what you know or have heard from others, how strongly do people in this area agree or disagree with the following statements?

Government Cooperation with U.S.

An overwhelming majority of Yemenis disapprove of Saleh's cooperation with the U.S.

Approval of Yemeni Government's Cooperation with U.S.



Q8: From what you know or have heard from others, do people in this area approve or disapprove of: the Yemeni Government's Cooperation with the U.S.?



Yemeni Government's Cooperation With the U.S.

An overwhelming majority of Yemenis disapprove of President Saleh's cooperation with the U.S.

Yemeni Government's Cooperation with the U.S.

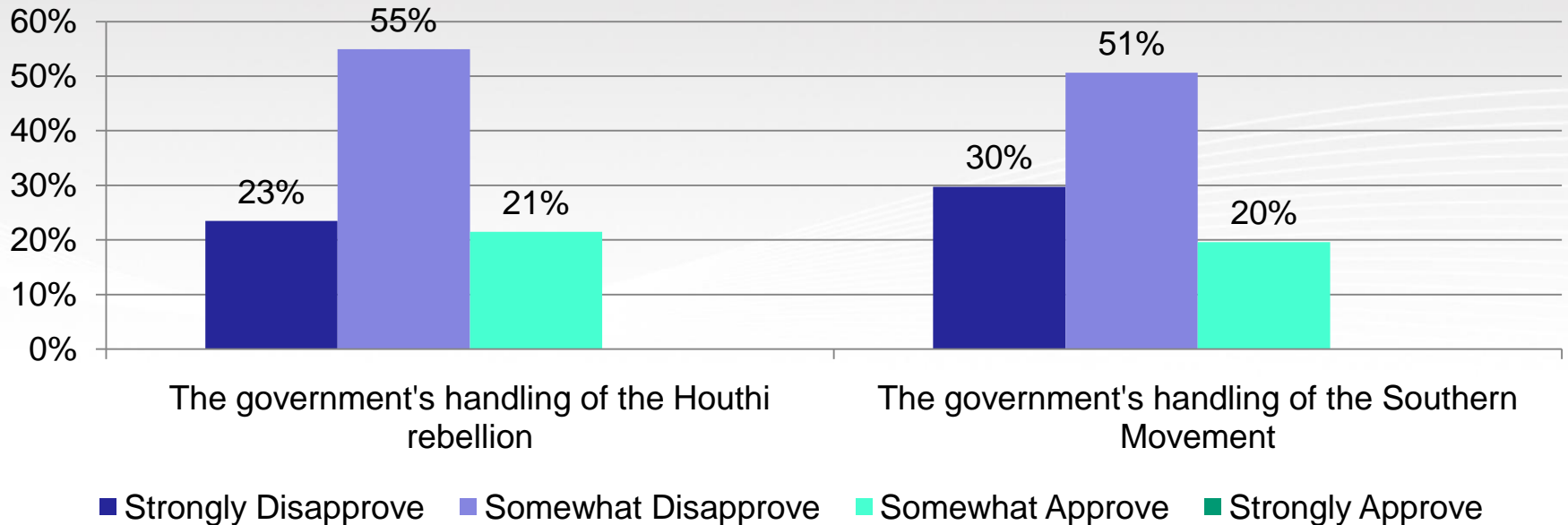
Only 4%
Somewhat or
Strongly Approve

Q8: From what you know or have heard, do people in this area approve or disapprove of: Yemeni government cooperation with the U.S.?



Government Handling of Internal Tensions

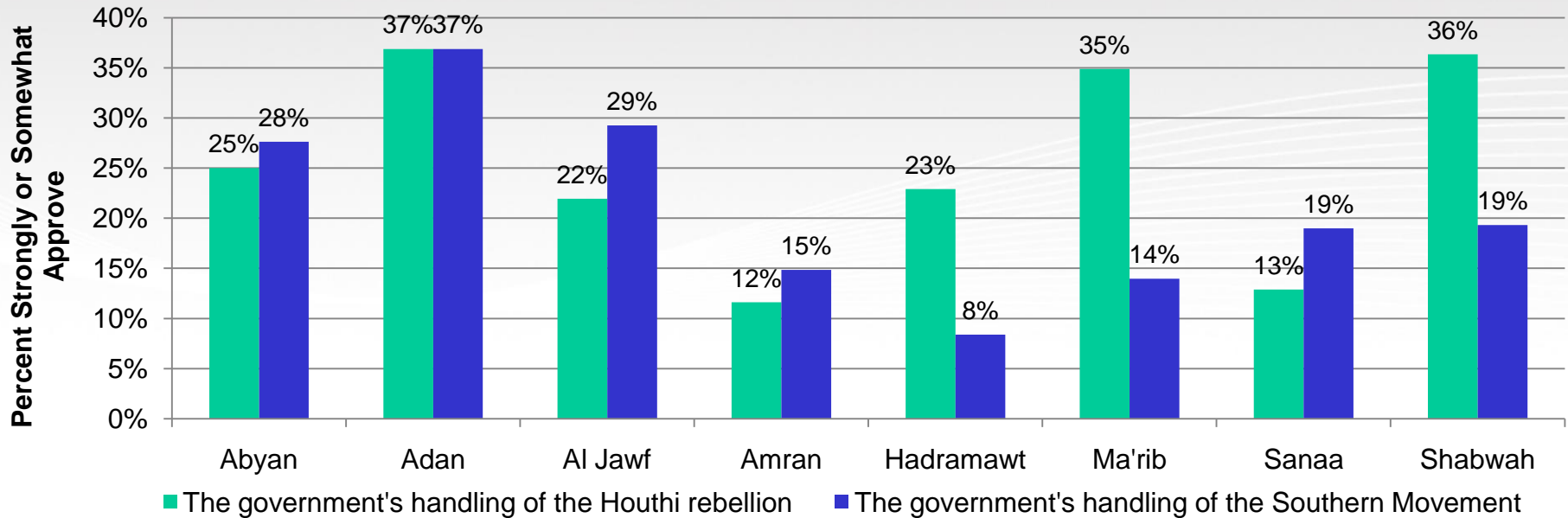
Overall, only 1 in 5 Yemenis somewhat or strongly approve of the government's handling of the Houthi rebellion and the Southern Movement.



Q8: From what you know or have heard from others, do people in this area approve or disapprove of the Yemeni Government's handling of internal tensions?

Government Handling of Tensions

Overall, 1 in 5 Yemenis somewhat or strongly approve of the government's handling of the Houthi rebellion and the Southern Movement. Approximately twice as many respondents in Hadramawt, Ma'rib and Shabwah approve of the government's of the Houthi rebellion as approve of the government's handling of the Southern Movement.



Q8: From what you know or have heard from others, do people in this area approve or disapprove of the Yemeni Government's handling of internal tensions?

Detailed Findings

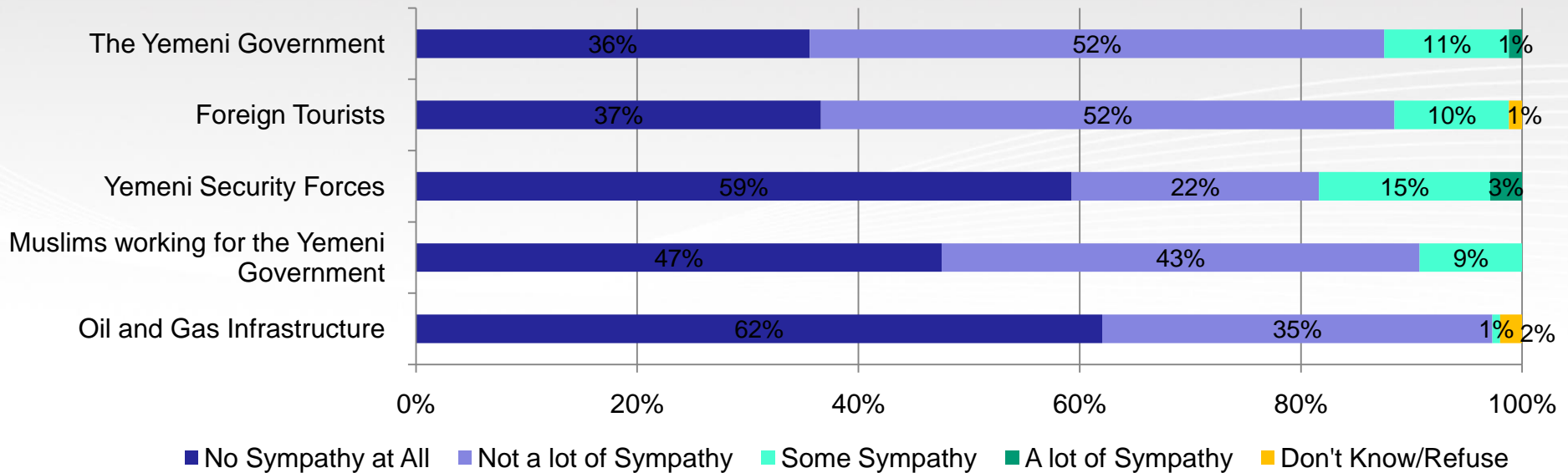


Opinions on Violence and Al-Qaeda in the Arabian Peninsula



Degree of Agreement with Al-Qaeda in the Arabian Peninsula (AQAP) Target List

Overall, Yemenis have little sympathy for the use of violence. Around 1 in 10 are sympathetic to using violence against most targets, except oil and gas infrastructure. Only about 1 in 100 support using violence against oil and gas infrastructure.

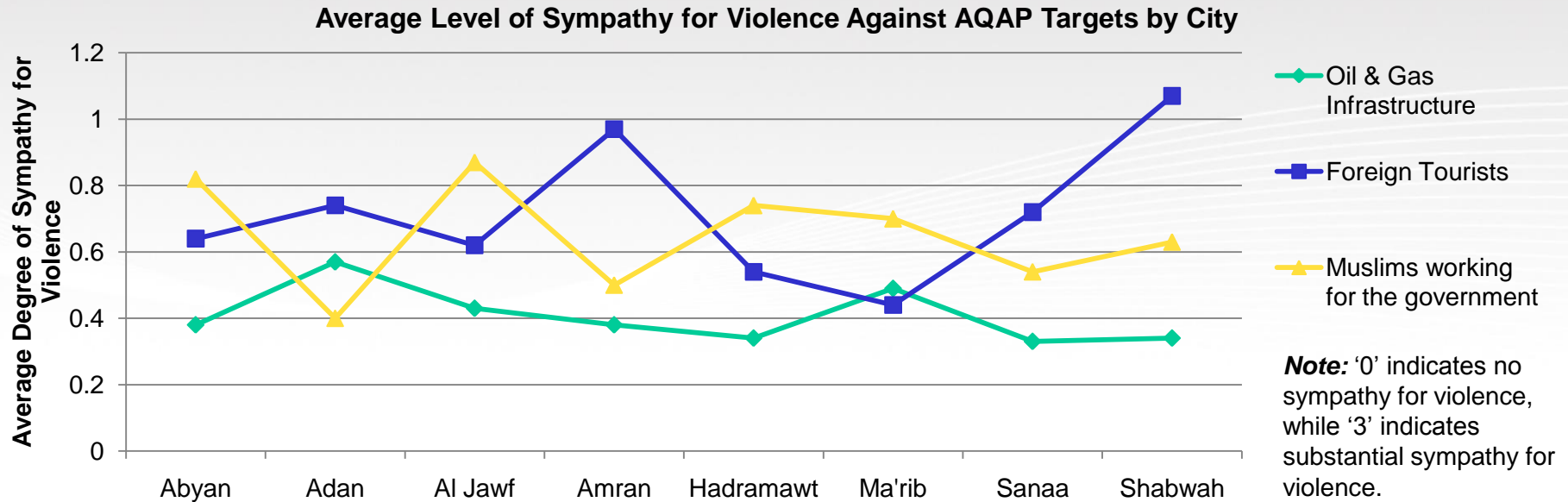


Q5: From what you know, or have heard from others, how much sympathy do people in this area have for the reasons that groups use violence against the following:



Degree of Agreement with AQAP Target List

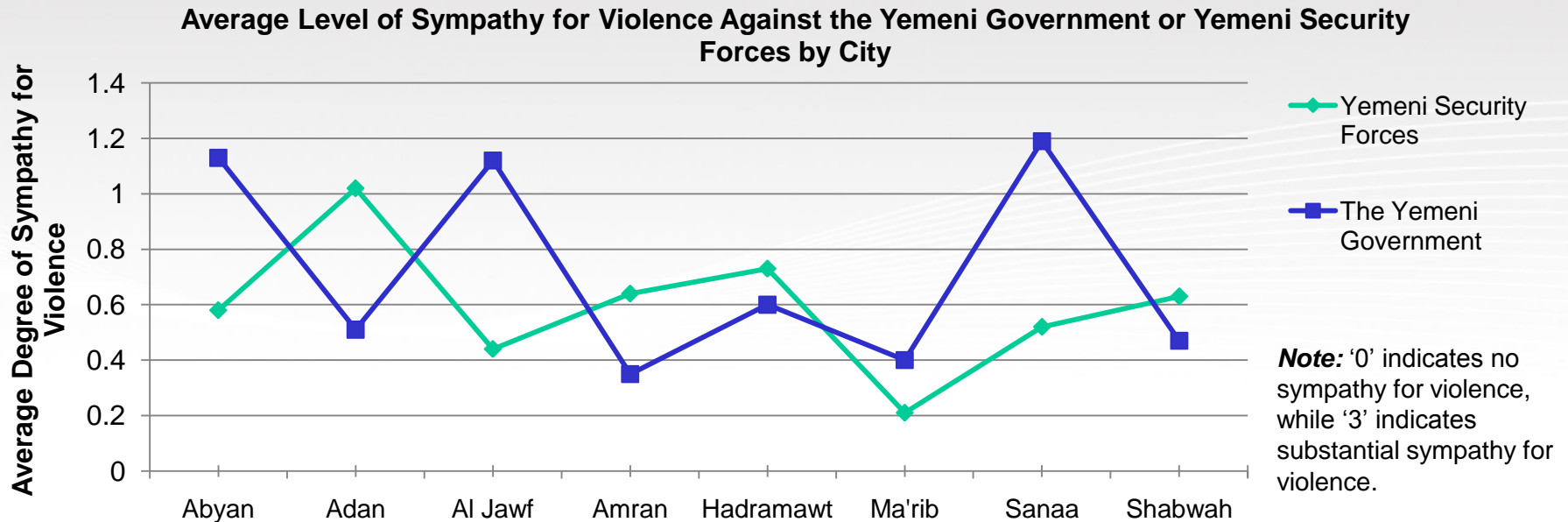
Cities that are less sympathetic to using violence against Muslims working for the government tend to have more sympathy for using violence against foreign tourists. The correlation is small at $-.18$. Shabwah and Amran are the most sympathetic to using violence against tourists.



Q5: From what you know, or have heard from others, on a scale of zero to three, how much sympathy do people in this area have for groups that use violence against the following groups or targets?

Sympathy for Use of Violence

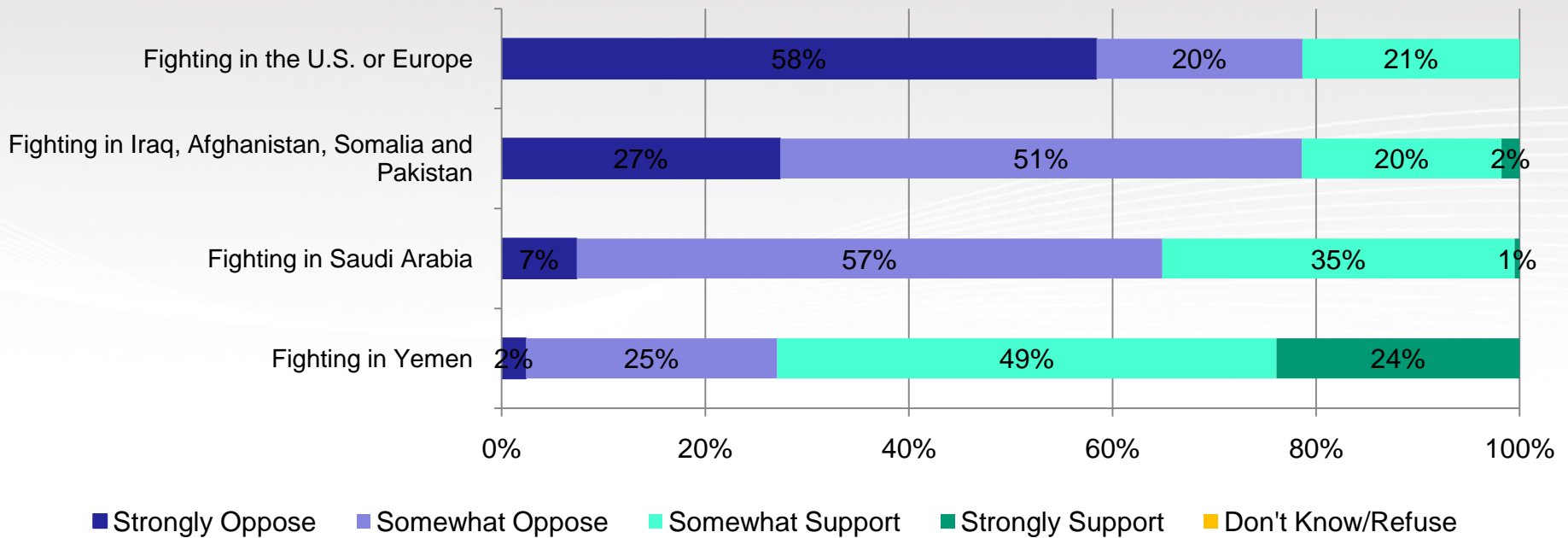
Al Jawf, Abyan and Sanaa express the most sympathy for the use of violence against the Yemeni Government.



Q5: From what you know, or have heard from others, on a scale of zero to three, how much sympathy do people in this area have for groups that use violence against the following groups?

Support for Fighting

There is considerable support for fighting inside Yemen and worrisome levels of support for fighting beyond Yemen's borders: with 36% support for fighting in Saudi Arabia; 22% in Iraq, Afghanistan, Somalia and Pakistan; and 20% in the U.S. and Europe.



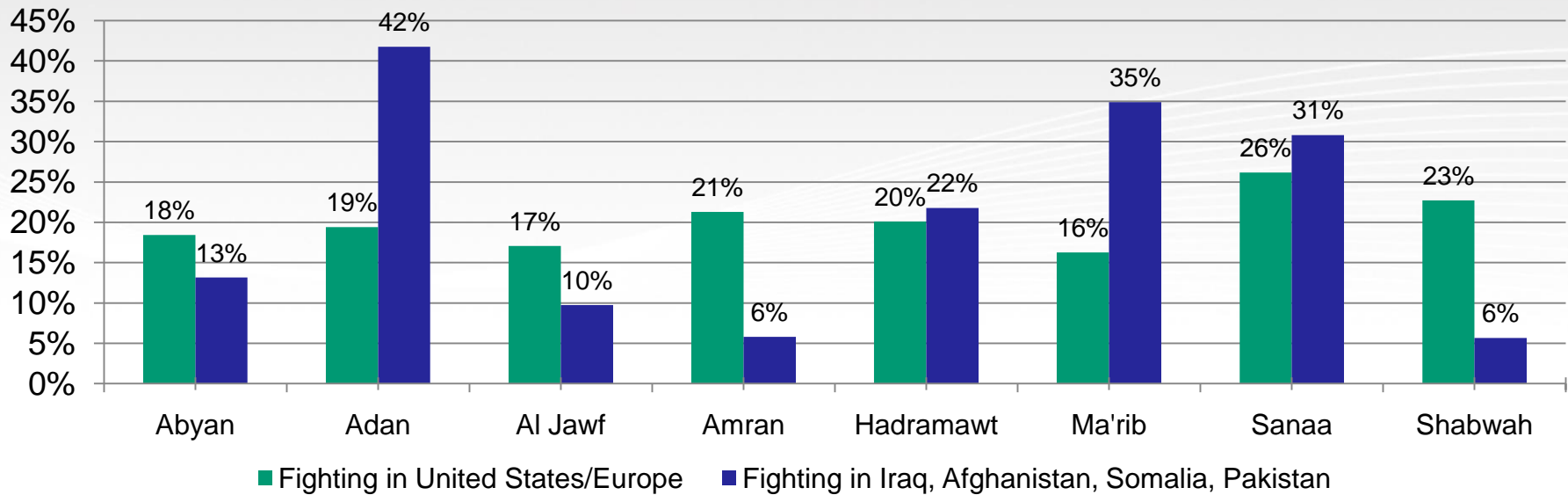
Q6: From what you know, or have heard from others, how strongly do people in this area support Yemeni participation in:



Support for Fighting

Approximately 20% of Yemenis support fighting in the United States or Europe without much variability between cities. 42% of respondents in Adan support fighting in Iraq, Afghanistan, Somalia or Pakistan, while only 6% do so in both Amran and Shabwah.

Percentage Who Somewhat or Strongly Support Fighting

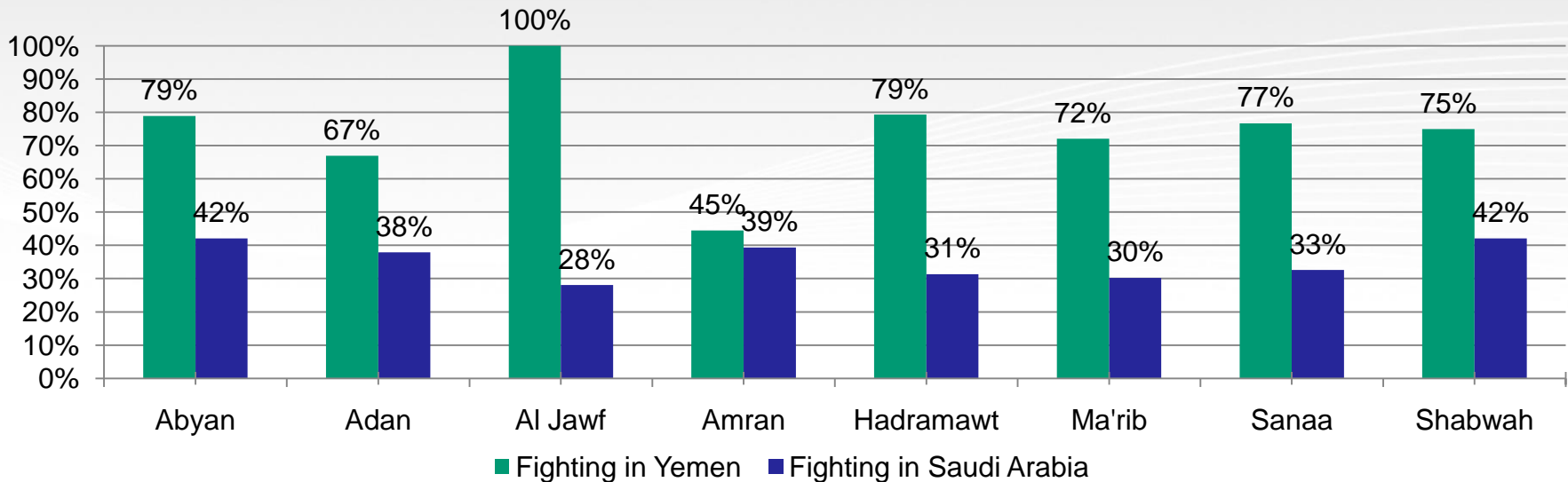


Q6: From what you know, or have heard from others, how strongly people in this area support Yemeni participation in:

Support for Fighting

100% of respondents from Al Jawf support fighting in Yemen. Approximately 3 out of 4 respondents from all other cities except Amran also support fighting in Yemen. Less than 4 out of 10 support fighting in Saudi Arabia and support does not vary by city.

Percentage Who Somewhat or Strongly Support Fighting

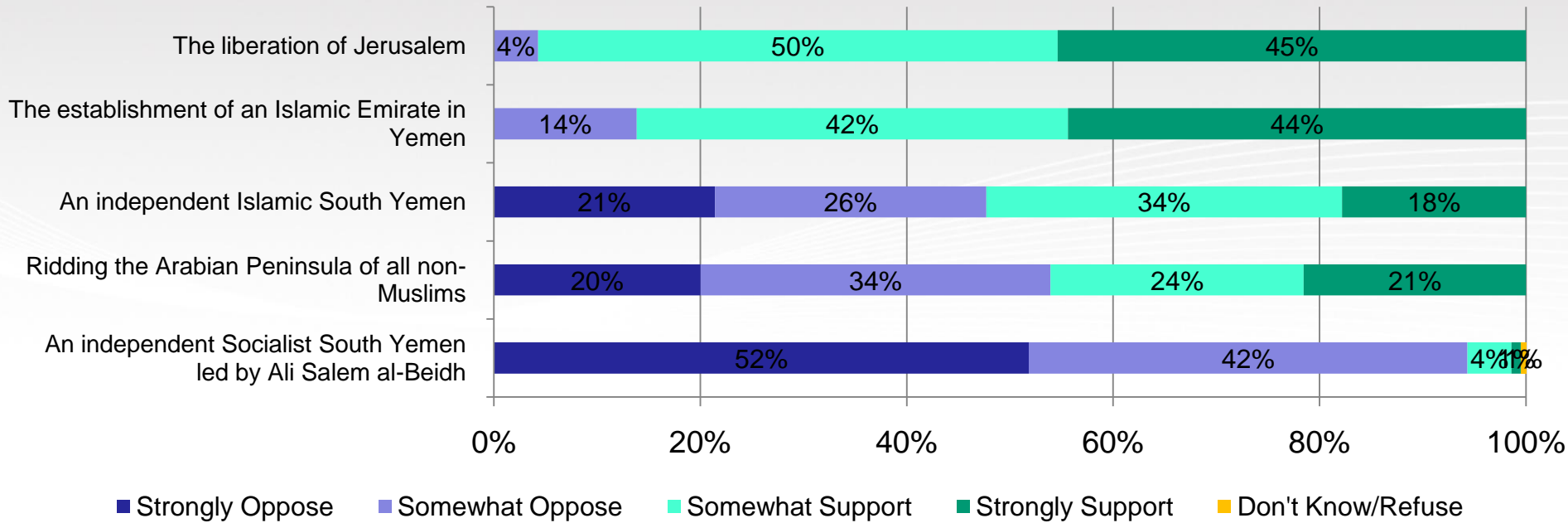


Q6: From what you know, or have heard from others, how strongly people in this area support Yemeni participation in:



Support for AQAP Policies in the Middle East

There is broad agreement with the two major tenets of AQAP policy recommendations: the liberation of Jerusalem and the establishment of an Islamic Emirate.

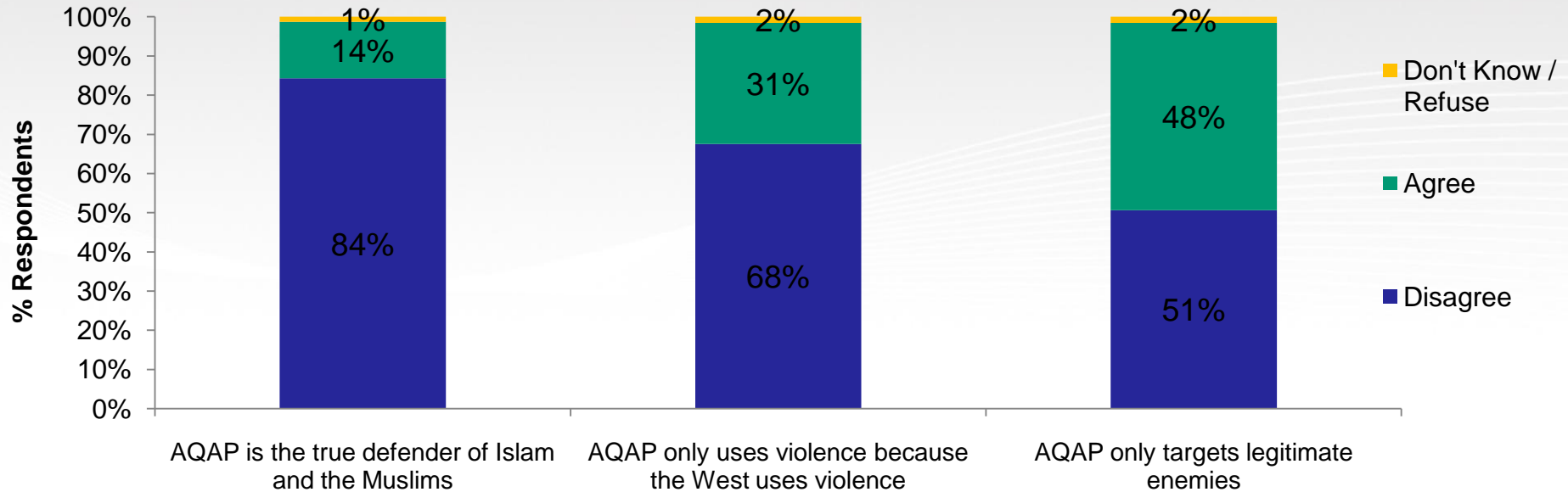


Q14: From what you know, or have heard from others, do the people in this area strongly support, somewhat support, somewhat oppose, or strongly oppose:



Al-Qaeda in the Arabian Peninsula

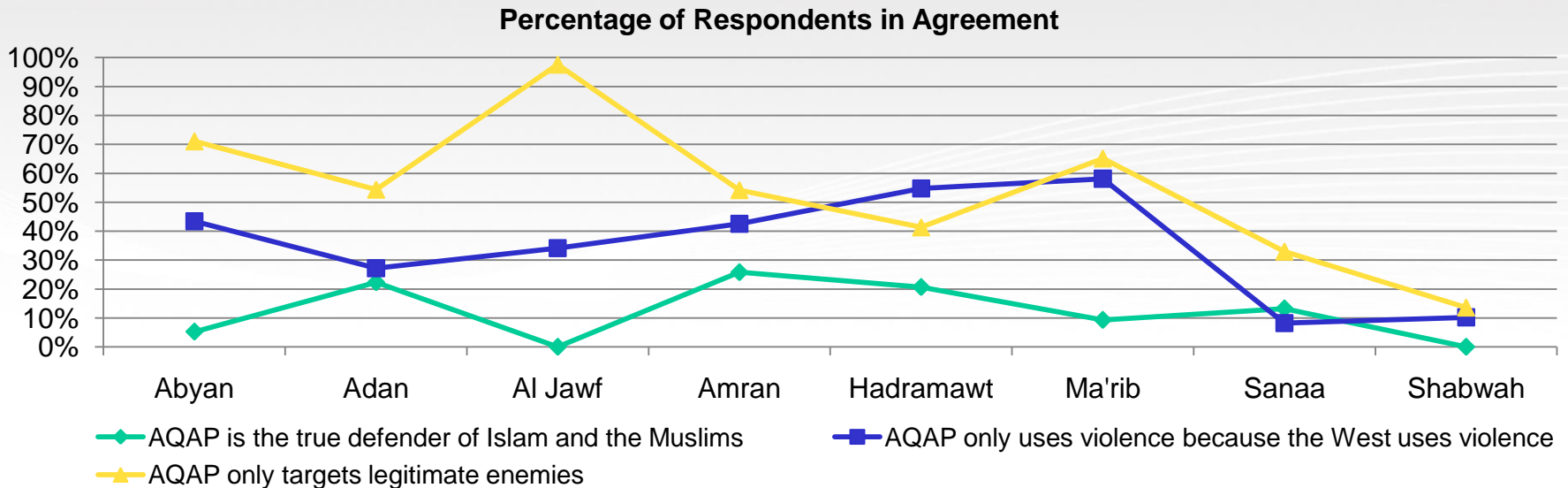
The overwhelming majority of respondents do not view AQAP as the true defender of Islam. However, nearly one third (31%) consider AQAP's use of violence an act of self-defense. A notable minority do believe Western violence prompts AQAP to use violence. Additionally, nearly half believe AQAP only attacks legitimate targets.



Q15: From what you know or have heard from others, how strongly do people in this area agree or disagree with the following statements?

Al-Qaeda in the Arab Peninsula

A large majority of individuals in every city believe that AQAP is not the true defender of Islam. However, almost twice as many people in each city believes AQAP only uses violence because the West uses violence. There is much disagreement between cities over whether AQAP's targets are legitimate: Al Jawf overwhelmingly agrees that the targets are legitimate, while Shabwah and Sanaa mostly disagree.



Q15: From what you know or have heard from others, how strongly do people in this area agree or disagree with the following statements?

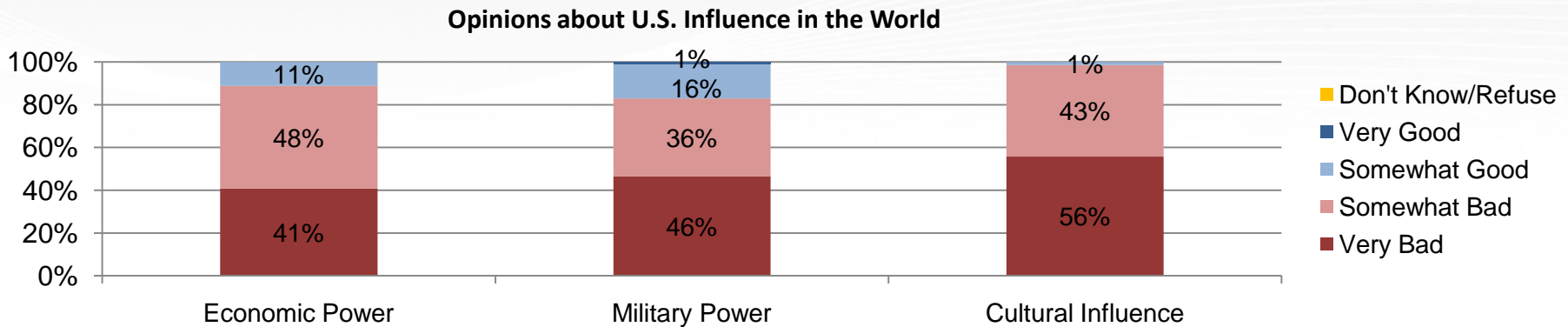
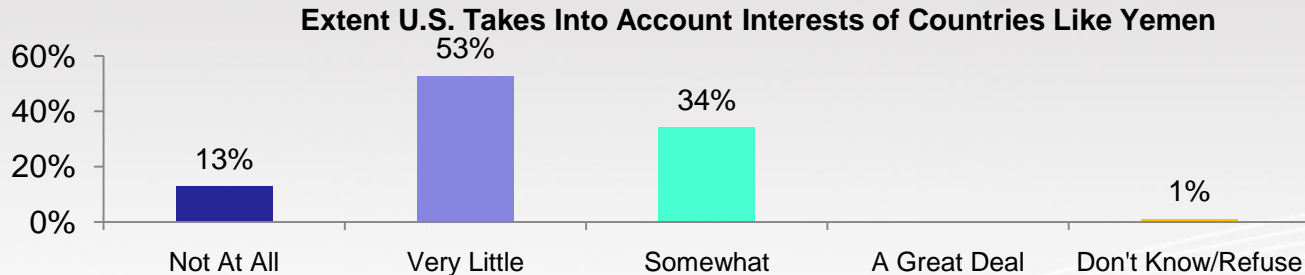
Detailed Findings

Perceptions of the United States



Perceptions of the U.S.

The overwhelming majority of Yemenis think that the economic, military and cultural influence of the U.S. in the world is bad and that the U.S. does not take into account the interests of countries like Yemen when it acts. The most negative attitude about the U.S. is cultural.

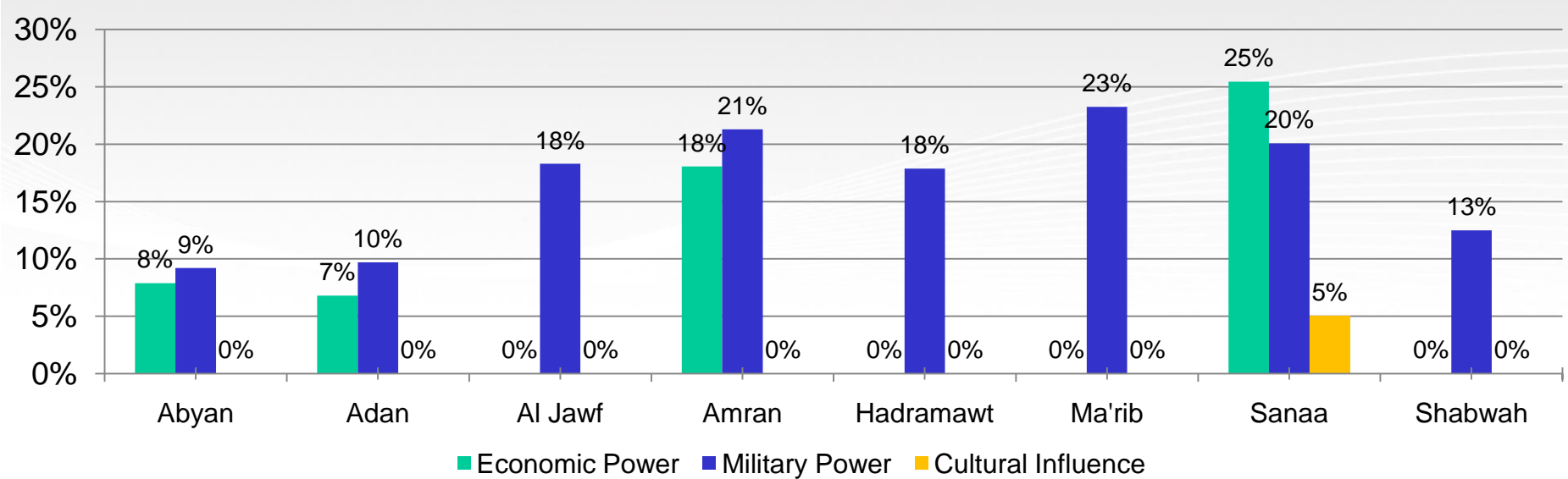


Q10: To what extent do you think that the United States takes into account the interests of countries like Yemen? Does the United States take into account the interest of countries like Yemen a great deal, somewhat, very little, or not at all?

Perceptions of the U.S.

Respondents in all cities have more negative impressions about the influence of the U.S. in the world than positive impressions. Interestingly, U.S. cultural and economic influence is considered worse than its military power.

Percentage Agreeing That U.S. Influence is Somewhat Good or Very Good

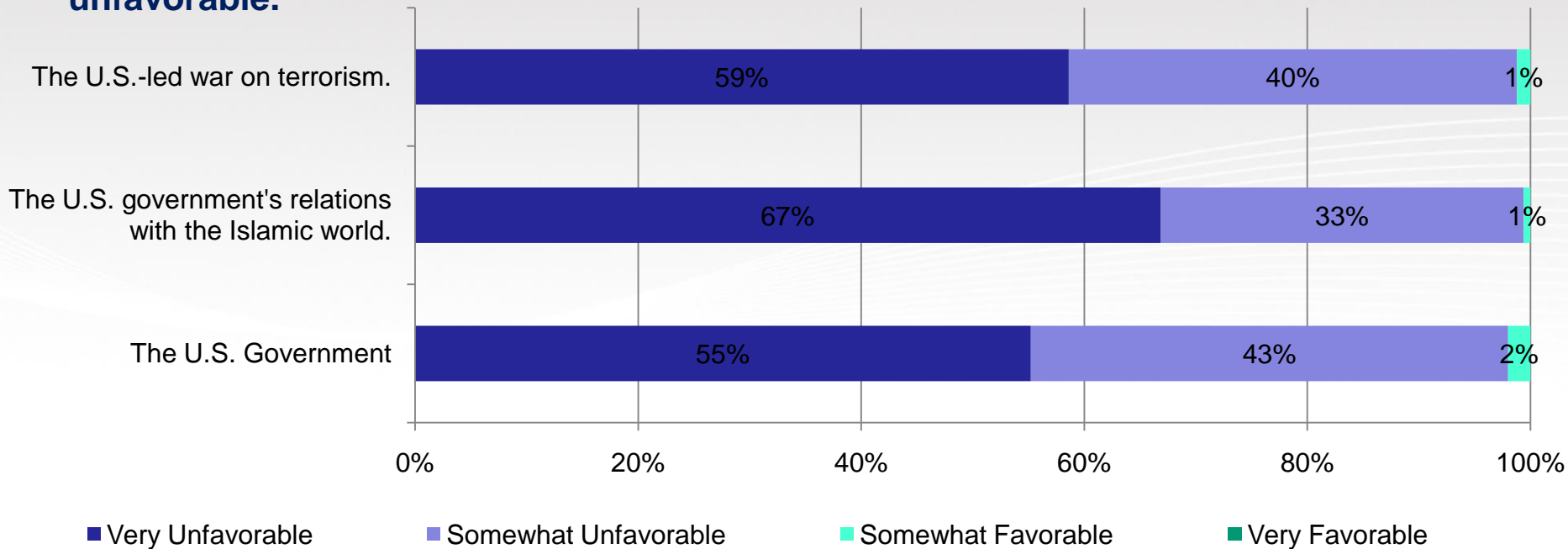


Q9: From what you know or have heard from others, do people in this area think the following things are very good, somewhat good, somewhat bad, or very bad?



Perceptions of the U.S.: Favorability

The overwhelming impression of the United States and its actions in the Middle East is unfavorable, with the majority of respondents viewing the U.S. as very unfavorable.

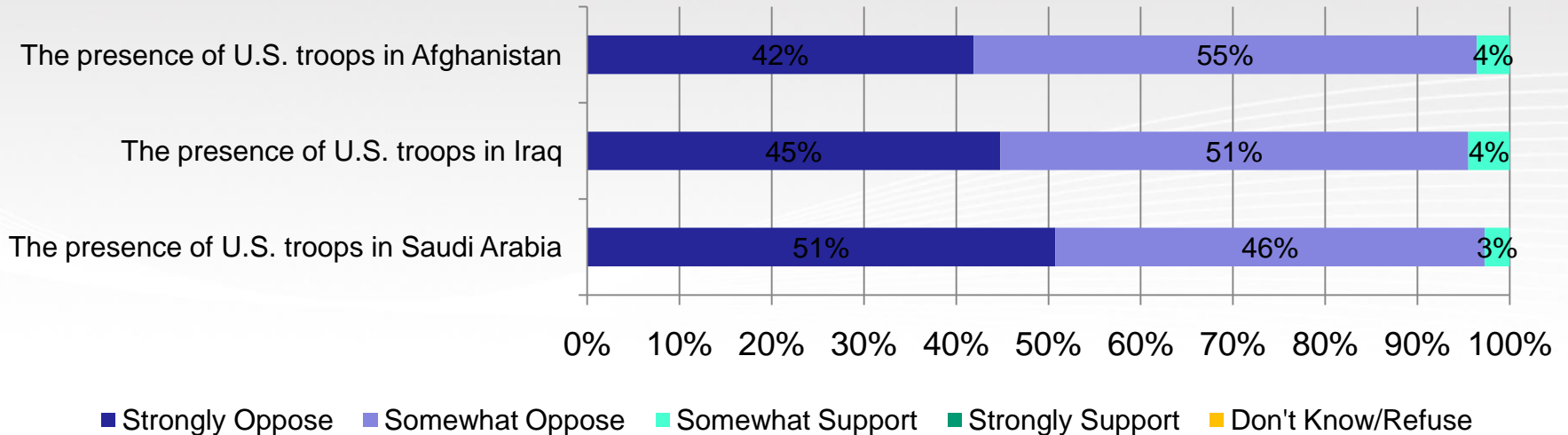


Q11: From what you know or have heard from others, do people in this area have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable view of the U.S. and its actions in the Middle East?



Perceptions of the U.S.: Support for U.S. Presence

Yemenis overwhelmingly oppose the presence of U.S. troops in Afghanistan, Iraq or Saudi Arabia.

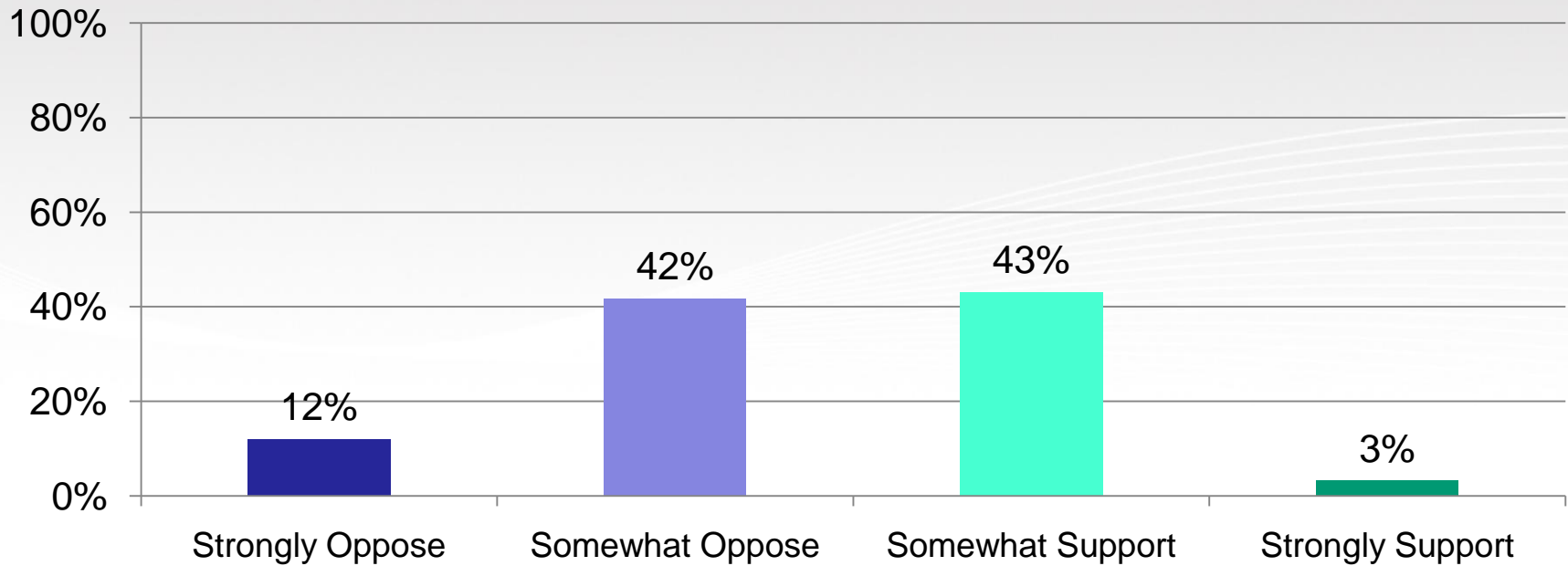


Q12: From what you know or have heard from others, do people in this area strongly support, somewhat support, somewhat oppose, or strongly oppose the presence of U.S. troops in Afghanistan, Iraq or Saudi Arabia?



U.S. Security Assistance to Yemen

Yemenis are split over whether they support the U.S. providing security assistance to the Yemeni Government. Few Yemenis have a strong opinion either way.



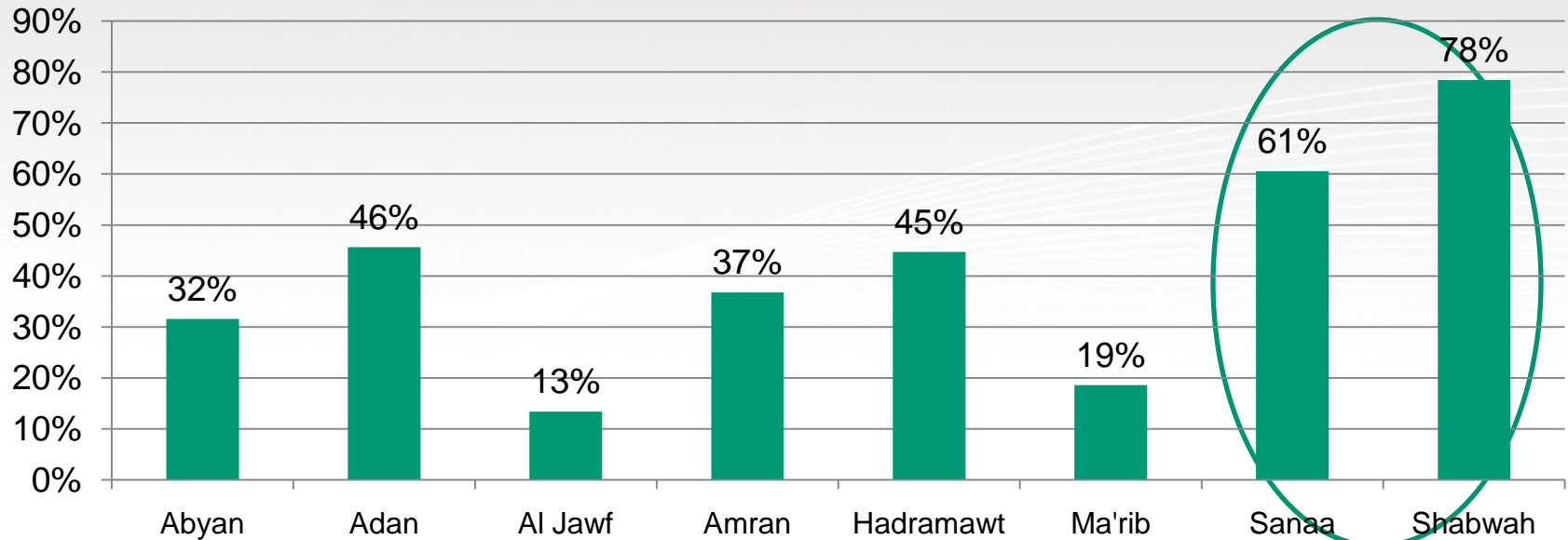
Q13: Do you strongly support, somewhat support, somewhat oppose or strongly oppose the United States providing security assistance to the Yemeni government?



U.S. Security Assistance to Yemen

The majority of respondents from Sanaa and Shabwah support the U.S. providing security assistance, while Al Jawf and Ma'rib overwhelmingly oppose U.S. assistance.

Percentage Who Somewhat Support or Strongly Support U.S. Security Assistance to Yemen

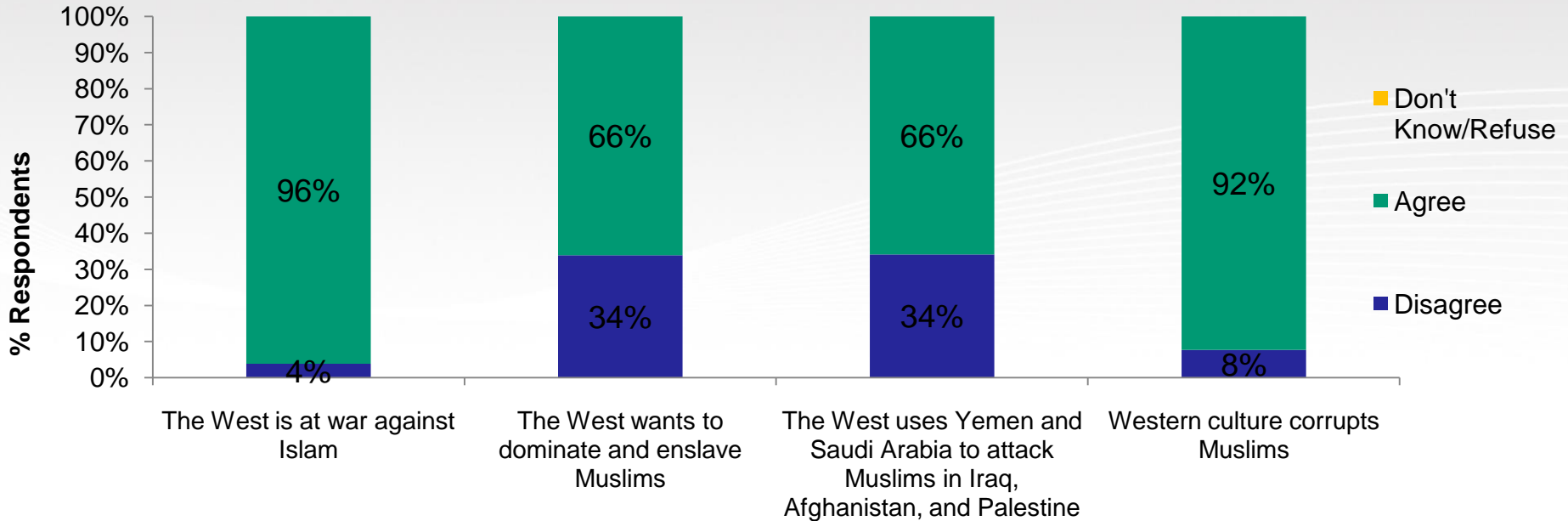


Q13: Do you strongly support, somewhat support, somewhat oppose or strongly oppose the United States providing security assistance to the Yemeni government?



The West's Motives

Yemenis see Western actions and motives as negative toward Islam and Muslims. Almost all Yemenis feel that the West is at war with Islam and that Western culture corrupts Muslims.



Q15: From what you know or have heard from others, do people in this area agree or disagree with the following statements?



Company/Team Profile



Glevum: Corporate Profile

- **Glevum (pronounced glē-vum) – Latin name for Britain’s Gloucester, birthplace of our company founder, and also U.S. home of our company CEO (Gloucester, MA)**
- **Offices in Boston (HQ), Gloucester MA, Washington, Kabul and Baghdad**
- **Among first to recognize crucial strategic benefit of socio-cultural and market research for military and diplomatic success in conflict and post conflict operations**
- **Leading provider of face-to-face research and analysis to the U.S. Government in Iraq and Afghanistan, studying identities, attitudes, perceptions, needs and wants and measuring the effectiveness of operations and programs**
- **Over 450,000 Iraqi and 150,000 Afghan survey interviews conducted and thousands of depth interviews and focus groups undertaken since 2007**
- **Utilizes reliable, well trained and tested indigenous field research teams and vendors**
- **Clients include U.S. Departments of State (DoS) and Defense (DoD)**
- **Capability to conduct multidisciplinary face-to-face research in 57 countries**
- **Self funds stability related research to enhance U.S. understanding of key regions**





- Glevum research partner Hot Zone Research is a strategic partnership between:
 - *IIACSS (Independent Institute for Administration and Civil Society Studies)*, based in Iraq
 - *Research One Marketing Consultancy*, headquartered in Dubai with strong survey expertise in Pakistan, Afghanistan, the Middle East and North Africa
- Hot Zone Research has more than 150 man-years of senior level experience in research analysis, field-work and data collection
- Hot Zone and its partnership companies have conducted multiple surveys for major Western companies and Governments throughout the Middle East and North Africa
- IIACSS has conducted tens of thousands of survey interviews in Iraq since 2003. Since 2009, IIACSS has worked closely with Glevum Associates in Iraq and now through Hot Zone in Yemen and Afghanistan



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